

EBOOK



# Insight into the Multichannel Salesperson

By Celestino Martínez

Over the past few decades, technology has given us a multitude of solutions that have influenced management, communications, and the production processes of companies. Those changes have understandably affected relations between companies and their customers, and had a profound impact on the work of sales teams.

The increase in competitive companies and, more recently, the economic crisis, have driven and accelerated the evolution of salespeople's activity, requiring them to adapt to a sales arena in which constant changes take place at unprecedented speed.

This process of continuous progress has been indispensable in satisfying the needs of B2B customers. Those customers have also had to evolve in response to the needs of the new consumer, whose buying rules have been influenced by the arrival of new purchasing and communications channels, and conditioned by the economic crisis.

*Celestino Martínez*

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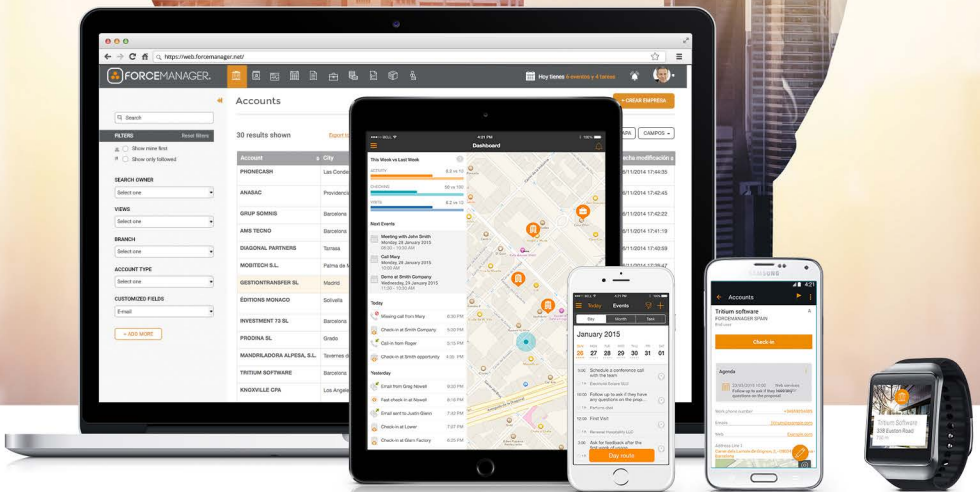
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# 01. THE EVOLUTION OF SALES RELATIONS

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## 01. The evolution of sales relations

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The role of the salesperson has historically been focused on selling. This usually consisted of an instant sale to a widely defined target customer, and without too much effort spent on building customer loyalty. For many years companies entrusted sales to the salesperson's capabilities and the Unique Selling Proposition (USP): the quality or qualities that make a product or service unique. This competitive advantage was used to support advertising and sales arguments as a means to achieve company objectives - which were usually limited to increasing sales growth.



In the second half of the last century, however, the role of the sales rep (and of salespeople of all kinds) has been transformed - a transformation all the more decisive as the offering of each sector became more saturated. We've gone from a market with more demand than supply to a market where the customer is overwhelmed by supply, with few products standing out from the competition. One of the main reasons for this is the ease with which competitors can copy a company's products, prices etc. in an increasingly short timeframe. **The sales function has consequently shifted its focus away from sales to the customer itself, and from a transactional approach to marketing to strategies focused on relationships.**

## 01. The evolution of sales relations

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Relationship marketing is all about identifying the needs of the customer to offer a tailored solution, via a sales process that meets customer expectations and achieves the highest possible level of satisfaction. Relationship sales aims for customer loyalty, or the creation of a lasting relationship with the customer based on the exchange of value.

The huge amount of competition in almost all sectors has raised the cost of customer acquisition and retention, and decreased sales margins. **The ultimate goal of relationship strategies therefore is customer loyalty**, as a means of reducing and recovering sales costs.

# 02. IN SEARCH OF CUSTOMER SATISFACTION

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## 02. In search of customer satisfaction

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If customer loyalty is achieved by repeatedly satisfying customer needs, it's obvious that you have to know what those needs are. But it goes beyond that. Equally important to meeting customer needs is how you meet them. This is where customer expectations come in – expectations that have to be met, or exceeded.

In the sales context, expectation refers to the experience that a customer anticipates having when they buy a particular product or service.

Expectation is unique for each customer, as it's based on his or her specific experience and knowledge. However, it has elements in common with the expectations of other customers if the purchase is made fairly regularly. As expectations are generated as much by the company offering a product or service as by their competition or similar sectors, it's a completely uncontrollable variable.

If customer satisfaction, therefore, is the difference between the experience that actually buying the product or service brings, and the expectations the customer has of buying, the variable where the company can make the biggest difference is customer experience. And this is where **the salesperson plays a crucial role as a provider of experiences.**

# 03. THE ROLE OF THE SALESPERSON IN THE CUSTOMER EXPERIENCE

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### 03. The role of the salesperson in the customer experience

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Customer experience can be defined as the sum of interactions (direct or indirect) between a company and a customer, between all the points of contact and across all the channels in which the experience takes place.

The majority of these points of contact are managed by the salesperson, who particularly in the case of a company, is the customer's connection to other departments within the organization.

**The salesperson is key for bringing added value to the customer experience.** The company therefore needs to provide the salesperson with the means to give maximum benefit to the customer, while minimizing the effect of price on the buying decision.



The level of professionalism of a company's sales teams, and their work as providers of experiences, is increasingly important. As we are about to see, **overall adoption of certain technological tools by the company plays a fundamental role in optimizing the salespeople's work**, improving customer experience and increasing company profitability by building customer loyalty.

# 04. THE INFLUENCE OF TECHNOLOGY IN THE SALES PROCESS

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## 04. The influence of technology in the sales process

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Technological development has brought about a revolution in sales relations. Fax and then email may have made a significant improvement to communication – and certain stages of the sales process – but the real tech revolution for the salesperson has come in the form of laptop computers and in particular, smartphones and tablets.

Before the advent of smartphones, the combination of laptop and mobile phones provided the salesperson with a mobile office, which hugely facilitated communications with customers and way the salespeople organized their work, sent orders and accessed information.

With the improvement in mobile connections and the evolution in related devices, the mobile office has reached a new level. Salespeople can now work in real time. This increases agility in various phases of the sales process and, in theory, improves customer experience. However, increasing the number of channels of communication with the customer also raises the risk of inefficiency in companies that haven't successfully integrated the new tools.

This became clear when companies adopted **internet 2.0**, multiplying the number of communications channels with the customer and adding the company blog, social networks and instant messaging services to the extensive list of channels. **Adopting these media transforms the shape of communications with customers to a multidirectional approach**, opening the door to direct communication with the end user and, as a result, adding new players to the sales relationship.

# 05. MULTICHANNEL SALES

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## 05. Multichannel sales

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Numerous channels now exist for managing the customer relationship. We can start to talk of multichannels when we add the 2.0 channels to the list of traditional channels to refer to the combination of online and offline sales and communication channels, and any other interaction with the customer that takes place in a direct or indirect way, within these or other contexts.

These new channels have resulted in increased flexibility in the sales relationship between customers and companies, allowing them to select a specific channel based on how convenient it is. The company can thus complement the salesperson's activity with other communications via any channel, offering promotions or one-off sales. The customer can also choose to use certain channels, for example for after-sales service or to exchange a product.



In certain companies online interaction with the end-user also provides them with information on customer preferences and needs, which helps the company communicate their values and improve brand experience.

Consequently, companies and brands have increasingly dedicated resources to developing the online channel, which has grown continuously in the past few years. The depart-

## 05. Multichannel sales

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ments responsible for managing the new sales channels, however, haven't always been created in a coordinated way with other departments. This has led to conflict situations that have reduced the quality of the customer experience, and in some cases can result in losing the customer.



# 06. MANAGING MULTI- AND OMNICHANNEL SALES

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## 06. Managing multi- and omnichannel sales

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If communications channels are managed correctly they can be used to optimize the sales process, using the most convenient channel for each stage of the process, and taking into account that the same process – for example the collection of information – can take place in various channels. Some of these channels are outside the company's control, such as blogs by experts in each sector who analyze products and strategies by the sector's key brands.

If the channels available to the customer are managed successfully the sales process can be personalized much more easily - improving the buying experience. But the salesperson has to be able to adapt to that personalization, a task that's impossible if they doesn't have the necessary information.

The lack of information and of coordination between company departments, which reduce the information flow, can generate uncomfortable situations that have a serious impact on the buying experience.



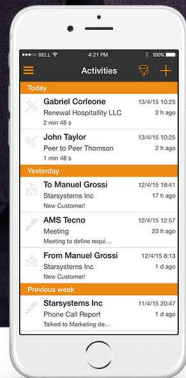
Examples of the most frequent inconsistencies between channels include putting different prices and conditions in each channel, sending promotional offers for a service the customer has already bought, or requiring the customer to repeat certain steps because

the information hasn't been centralized. This lack of consistency affects the customer's trust and complicates the task of the salesperson – usually the person to deal with customer complaints.

Even if these situations don't generate serious problems, they still result in lost opportunities to sell or improve the customer experience. They also damage brand image, as the customer perceives the relationship with the company as one channel – or omnichannel – interacting with the brand through the channel they see as most appropriate at the time, and at the most convenient moment for them.

**This is leading the salesperson to take on a new profile**, capable of meeting the needs of current consumers who use the different sales and communications channels, and of **developing their role as bearers of brand values and generators of experiences** - while providing information to the company on how to continuously improve that process.

# SALES EFFICIENCY ON THE MOVE



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# 07. THE MULTICHANNEL SALESPERSON

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## 07. The multichannel salesperson

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In many sectors the salesperson is there to present new features or products, make a case for buying the product, and make sure sales policies are complied with. Not all these activities take place through a physical channel - hence the expression, the multichannel salesperson.

It's usually the customer who manages the process of changing a product, or contacts after-sales service using channels that range from fax, telephone, email, the customer section of a website or social networks.

Companies increasingly use these channels to send sales messages to the customer through emailing and telemarketing campaigns, or by sharing multimedia content in social networks. The different replies they receive are essential for focusing future sales.

The presence of the multichannel salesperson in the physical channel is vital, as they provide the human element that connects all channels, using information strategically to achieve good sales, outstanding customer experience and, in the long term, that all-important customer loyalty.

For this to happen, **companies need to provide the salesperson with the training, information and resources necessary to integrate smoothly with a multichannel strategy**, minimizing inconsistencies between channels.

# 08. THE SALESPERSON'S TOOLKIT

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## 08. The salesperson's toolkit

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How technology has developed is also reflected in the salesperson's day-to-day work. Gone are the days when the sales rep traveled around with samples, catalogues, lists and order books.

The first laptop computers with fixed or mobile connections had already increased sales efficiency by automating various processes such as access to basic customer information, and essential data such as product stock – even if the frequency of data updating left much to be desired.

The improvement in mobile connections and the development of management programs led to improvements in sales software, increasing the quantity and quality of information available for use in the sales process. This was often through specific programs integrated in the ERP system, which managed processes related to the product such as logistics, distribution, inventory, shipping, billing and accounts.

**It was, however, the arrival on the market of mobile phones with an internet connection and tablets that, together with cloud computing and the use of CRM systems were to reinforce the efficiency of sales efforts and facilitate its relational approach.**



# 09. OBJECTIVES, INCENTIVES AND REPORTING

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## 09. Objectives, incentives and reporting

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It's very common in sales for remuneration to be both fixed and variable, consisting of commission, incentives to meet specific objectives or a combination of both. In theory this incentivizes sales, although its success depends on whether the conditions allow for fair remuneration, and whether the objectives are realistic.

Setting objectives is a delicate task that requires a maximum amount of information in order to personalize them, as the variables are different for each salesperson depending on the area they cover, the product they sell and various other factors.

Not personalizing objectives and incentives, which is usually due to a lack of quality information, raises the risk that the objectives don't fulfill their role and act against the interests of the company, the customer and the salesperson.



A lack of segmented, quality performance indicators makes it difficult to reward sales activity that brings added value to the sale and improves customer experience - encouraging loyalty and further sales. Other performance indicators that are often used, instead of recognizing factors that bring quality to the sale, actually penalize them, such as rewarding the number of customers attended to within a certain timeframe. **It's important that indicators are based on aspects related to buying satisfaction**, e.g. a low rate of returns, higher buying frequency, or a satisfaction index.

## 09. Objectives, incentives and reporting

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Traditionally certain performance indicators have been developed by cross-referencing company information with the reporting carried out by salespeople following their sales call. Writing up reports has always been a source of conflict as it requires an excessive amount of the salesperson's time and doesn't result in an improvement of the customer experience. In some companies the salesperson spends almost as much time on sales reporting than on actually selling – a clear sign of a lack of optimization of this part of the sales process.

# 10. TOOLS FOR THE MULTICHANNEL SALESPERSON

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## 10. Tools for the multichannel salesperson

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The appearance of smartphones and tablets, combined with the possibilities provided by cloud computing, have given rise to new tools such as ForceManager, which facilitate the management of sales teams and the work of the salesperson.

The **ForceManager** application is based on geolocation. This means the salesperson can see other customers in the vicinity of a sales call, identify sales opportunities, or generate an automatic report following a sales visit. Sales management meanwhile can monitor the sales team's work in real time.

Cloud computing means the salesperson has instant access on each sales visit to vast databases of up-to-date information on all previous interactions between the customer and the company, resulting in a totally personalized sale.

The user friendliness of tablets and their high quality screens means the salesperson can share with the customer catalogues, presentations, videos, documents or any other tool that helps to personalize the sale, including taking photos and making simulations, or taking notes directly on the tablet.

Another advantage is that nearly all the salesperson's reporting is done automatically, saving them time that can be more valuably spent on sales calls to more customers.

**The best applications automatically provide personalized analytics for the salesperson and sales management, facilitating decisions for improving the sales process and sales strategy.**

# 11. THE IMPORTANCE OF THE HUMAN FACTOR

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## 11. The importance of the human factor

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One of the main fears prompted by technological progress is that technology will eliminate the human factor - or in this case, sales relationships. It's true that some progress has reduced the presence of the salesperson in certain stages of the sales process.

Yet all this is not leading to more impersonal sales – quite the opposite. **Technology makes it easier for the salesperson to deliver a more professional and personalized service**, focusing his or her activity on certain key aspects – and those that bring more value to the sale.



Meanwhile, the customer has also seen an improvement in the quality of sales processes that gives them greater autonomy, and responds more effectively to their interests. The customer experience is more satisfactory, and in some cases, even memorable.

Technology continues to advance and provide new and better tools. **The tools that will make a real difference are the ones that help improve satisfaction levels of the people involved in the sales process** – those that reinforce the human factor. Because at the end of the day, sales is still an activity that takes place between people.



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