Sales Enablement Platform

WHAT IT IS, WHAT IT ISN'T AND WHAT IT SHOULD BE

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In the last few years, there has certainly been a lot of talk about sales enablement—it's one of those trendy terms that came around and has definitely remained. It has come to the point now where software vendors are promoting a new type of solution called a Sales Enablement Platform (SEP). In one respect this is great news, for salespeople have never needed more enabling than they do today. There's only one problem: just what is a Sales Enablement Platform?

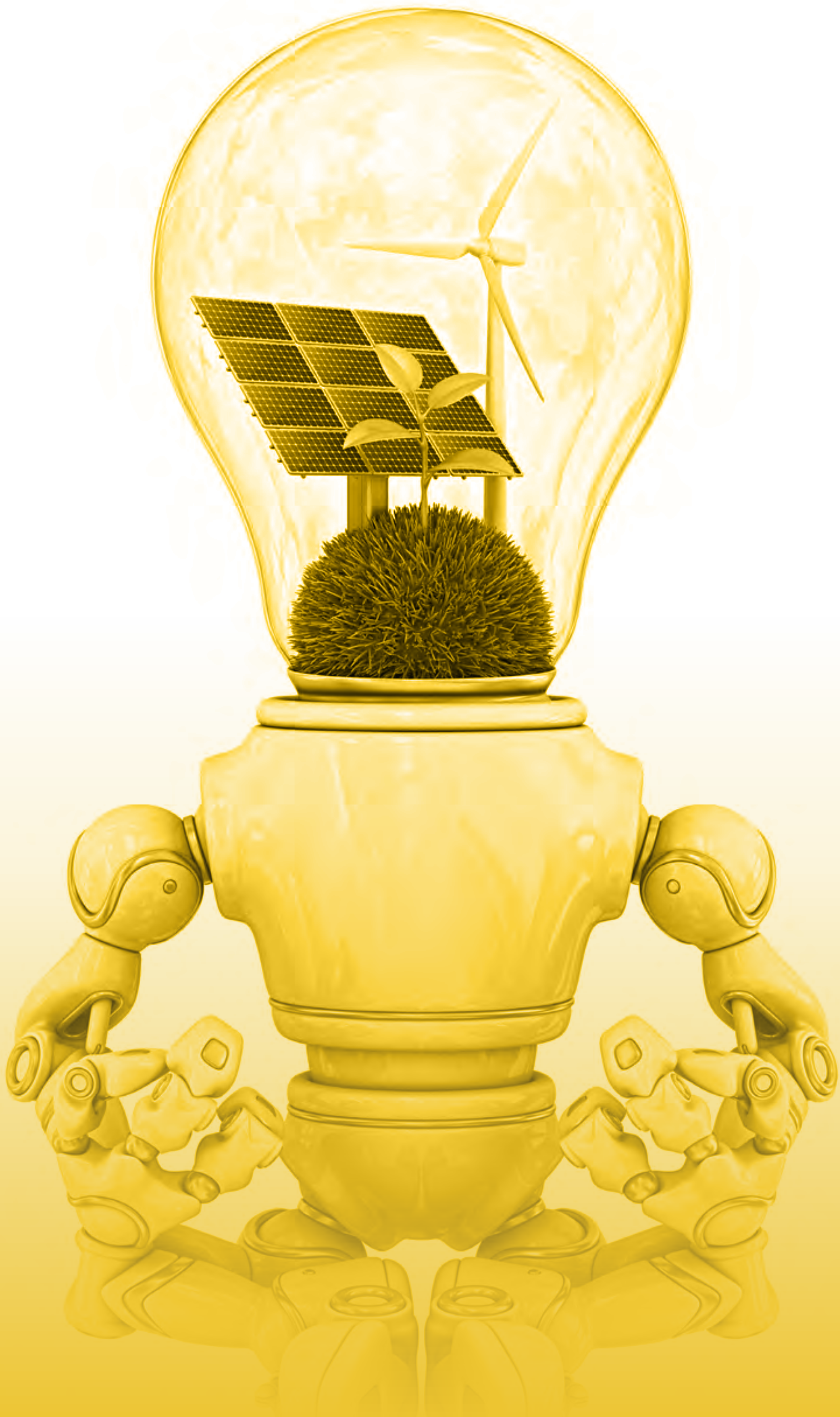
There certainly is no sales enablement "magic bullet"—you utilize it and *bang!* instant results! People today will jump on any train when they hear it will bring immediate positive painless change—even as they know there is no such thing. It's like trying to win a gold medal without doing any training, even though you know that can never happen.

So what is sales enablement, really, and where is it going? Is it just a buzzword that becomes an umbrella for various solutions? And what exactly is a sales enablement platform?

Depending on which vendor you reference, an SEP sounds an awful lot like a CRM. But at least one vendor I found goes well out of their way to say that their product, this SEP, is most definitely *not* a CRM. Yet that same vendor states that their SEP has "CRM characteristics." Another SEP calls itself, "The Sales Enablement CRM." Other SEP vendors spell out benefits that sound exactly like those of a CRM application. What gives?

However we define it, sales enablement is very important today, and will become more so in the future. Why? Because even if you have a top performer, how much better are they going to be if they have the right tools?

Let's have a look at what sales enablement really entails, and what a Sales Enablement Platform really is and what it should be.



"Being customer focused is likely to make customers more interested in dealing with you (as opposed to choosing your competitor). As a result, being customer focused can help you improve your sales, business, and profits."

— PAUL VIIO

1 SALES ENABLEMENT —Compartmental or Holistic?

In my opinion, the number one problem with sales enablement is that we firmly place it in various company departments or divisions. In actuality, it should be a strategic leadership goal. Enabling sales should be done not just for the sales team, but for the *entire organization*, because every organization, in some form, needs to be enabled to sell.

We hear today that companies survive as well as they treat the buyer. We hear it over and over—the buyer! The buyer! The customer! The customer! Well, where exactly does the customer interact with the organization? Is it just in sales? Let's look at air travel. A passenger can have a wonderful experience in the pre-flight lounge, with boarding, and with the service during the flight. But that whole experience can be ruined when one of the links in the service chain is broken: the passenger has to wait 2 hours for their luggage! What will the passenger's memory of that flight be? They will most likely forget they had a very nice trip—simply because in their mind that experience is measured *holistically,* not in parts.

So when we're speaking about the important factors in sales enablement, we need to view the whole customer experience—it's not simply the charge of the VP Sales, or just for Sales and Marketing. It crosses the whole company, into support, customer service, accounts payable, and everywhere else.

It's interesting that there is another buzzword that's cropped up in the last couple of years: *customer-centric*. Well, what does that term mean? It certainly does not mean "customer-centric" in only one or two departments. It has to happen everywhere.

You must realize that your customer doesn't view your company by department. They're not sitting there seeing "XYZ Company Sales" and "XYZ Company Delivery." They view it as "XYZ Company"...period. If one department creates a mediocre customer experience, it colors the whole company.

Combination of Factors

As stated earlier, there is no single approach to sales enablement—"One thing, and we're there!" No, it's a combination of factors:

1. Sales enablement has to go in from the highest level of the company.
2. Sales enablement has to go in across every department.
3. Sales enablement is a mindset—and cannot just be a mindset of 1 or 2 groups, but must be the mindset of the entire company.

In this way, I disagree with most of my other colleagues on the subject, as their focus is strictly on salespeople. No, the whole company must be enabled to sell the product and satisfy the customer, and it is the task of management to produce value for customer satisfaction.

Of course we want to enable the sales team—but why not see it holistically, and realize that a support person could be instrumental in sales? That doesn't mean the support person is immediately selling, but they have the mindset to service the customer, and not just automatically shove them over to sales.

This single-department-focus mindset can be extremely frustrating for customers—just ask any American about calling their bank. In order to speak to a representative who will actually help them, the customer must navigate a maze of automated robots. They end up (at least I do, and I know I'm not alone) pounding on the "0" key to get a live person.

What It Takes to Win

As I write this, American football season is about to start, and I'm a big fan of the New England Patriots. What will it take for them to win the Super Bowl again? As the season starts, they'll certainly be asking that question. They have the coach, they have the team. How can these components be optimized and enabled to win?

For a company, what does winning mean? It means a satisfied customer. For there is one factor that is too often overlooked in business: winning a new customer is not easy. That's why keeping the customer is crucially important, because it's far easier to sell to an existing customer—extend, cross-sell, upsell—than to win a new one.

The Right Gear

In football, part of winning is the right gear. A gross example of this is, could you imagine a football team trying to play in sandals? A little rain, and that field gets pretty slippery, so sandals won't cut it. When the receiver has no gloves, they can't catch the ball. With no helmets, they're going to get pretty banged up.

In companies and in sales, this analogy translates over to having the right tools. Some companies "play the game" of customer satisfaction with gear this crude—Excel spreadsheets instead of a truly enabling CRM solution such as Pipeliner. What's sad is that they might have decent team members and a good coach, but they cannot compete in this big, broad business world without the right gear. They'll slip when it rains—and as we know, in real life, there are more rainy days than sunny ones.

Because the proportion of losses is generally high, I strongly believe that we need systems with which we can learn from losses. Lost opportunities can be accurately analyzed, and insights gained to enable sales and the rest of the company. If you don't know why you're losing customers, how can you enable sales and others *not* to lose them? It's a contradiction. (Hint: Pipeliner CRM, with its Archive feature, totally provides for such analyses.)

Now...believe it or not, sales enablement must start before people. Let's find out about that!

“Change is constant. This seeming paradox points to both the problem and the solution for how professional corporate policy needs to be designed. Change alone is chaos. Constancy alone is paralysis. Both together, however, generate a dynamic order for the function of and life in systems.”

— FREDMUND MALIK

WHAT MUST BE ENABLED BEFORE PEOPLE?

I'm going to make a statement now that shows how much I disagree with common "wisdom" on the subject of sales enablement. I'm probably shouting into the desert, but I'm going to say it anyway: *When first done, sales enablement has nothing to do with people*. This may sound contradictory—and taken literally, it is! But stick with me and you'll see where I'm going.

Over 150 years ago in the U.S., people were coming west to California in droves in search of gold. If they hadn't been provided with picks, how would they ever have found it? With their bare hands? Hardly!

It's a similar situation with sales. Most companies, when they engage in sales enablement, focus on the sales manager and pound on them to coach salespeople. But salespeople haven't been given any path to follow.

The Path

What must come before people? Processes!

In the last chapter, I painted the picture of a holistic customer process with an airline. It begins when the passenger arrives at the airport, then they check in, check their baggage, get to the lounge, board, have great service during the flight, land, and claim their luggage. These are all individual processes, and each is important to the overall traveller experience.

Establishing processes is vital. Look at Hurricane Dorian that endangered parts of Florida sometime back. Several cities had to evacuate, which meant that patients had to be moved from hospitals. Can you imagine the kinds of processes that were in place for that to happen? Where to take the patients, keeping track of their treatments and medications, coordination of ambulances—if these processes had not been precise and clear, it would have been a chaotic disaster.

In Business

In a company, there are many individual processes, and they're all centered around the buyer. There could be all kinds of processes: pre-sales, sales, after-sales, support, accounts receivable—and all of them have to be enabled. In the future, I truly believe that no company will be able to survive without fully examining and enabling their processes. Logistically it would be impossible.

Just in sales, most companies today require more than one sales process. In addition to the ones listed above, there are often separate sales processes for different product lines, as some products would have simple sales cycles while others might be more complex. There would also be different types of sales processes for products versus services.

Automation

Once processes have been decided upon, the next question to be answered is: can some processes be self-sustaining and automatic? Can some of them in the customer experience be more or less self-regulated? An example of a well self-regulated process would be a traffic circle (called a roundabout in the U.K. and other parts of the world), in which vehicles come in one side and exit at another, with no traffic lights needed.

Having most processes be manual might have worked well for a company back in 1850, but today it won't work at all. As each process is defined, the option of automation must be taken into account. For example, obtaining of leads: can inbound marketing be automated? Can leads be brought in automatically? Can they possibly be distributed automatically, to salespeople or partners? With the lightning speed of commerce today, automation has become extremely important.

At Pipeliner, part of our thinking has been to alleviate the repetitive tasks salespeople must regularly undertake, which has been especially evident in functionality such as our recent Automatizer. Automatizer makes it possible to automate routine tasks. Another aspect of the sales job that salespeople hate is data entry. We therefore created the Web Clipper for Google Chrome, which assists in importing data from the web into Pipeliner.

Integration

As you automate, you must make sure that the tools you are employing can fully integrate with each other—otherwise there will be manual processes required just to coordinate automation, which is pretty self-defeating.

A company might choose various solutions that seem great at the time, such as sales call recording, email automation or automated proposal software. They've heard that such tools can increase sales by 25 percent! But if they only operate independently, they are going to absorb more time than they save. It would be like producing a beautiful steering system for a car—but if it isn't integrated with the remainder of the car's components such as the engine and the wheels, that car won't go anywhere.

Dynamic

Many processes, but especially sales processes, must be dynamic. That means the process has to be able to be changed as needed. This is because market conditions change, buyers change, and technology often forces us to change. The opposite of dynamic is static—and static processes will soon be run over and flattened by competitors with changeable, dynamic processes.

According to renowned economist and management scientist Fredmund Malik, whose management methods we have adopted at Pipeliner, "Change is constant. This seeming paradox points to both the problem and the solution for how professional corporate policy needs to be designed. Change alone is chaos. Constancy alone is paralysis. Both together, however, generate a dynamic order for the function of and life in systems." (From *Corporate Policy* by Fredmund Malik, Chapter 1, Page 63)

We can simply look at world conditions and see that this statement has never been more true—change is constant. Therefore when we speak about sales enablement, we must have dynamic processes that are easily changed when needed. This flexibility must be reflected in the technology, such as the CRM, being employed by the company.

Policy

You can't automate everything, however, so one final element must be established before you can enable people—and that is policy. That policy wouldn't just be for salespeople, but for the company as well. Everyone should be clear on their duties, and the methods of performing them. Policy should be created and provided to people no matter how talented they are, how skilled they are, how well they are performing or how well they're paid. This is the enablement of the company.

Summary

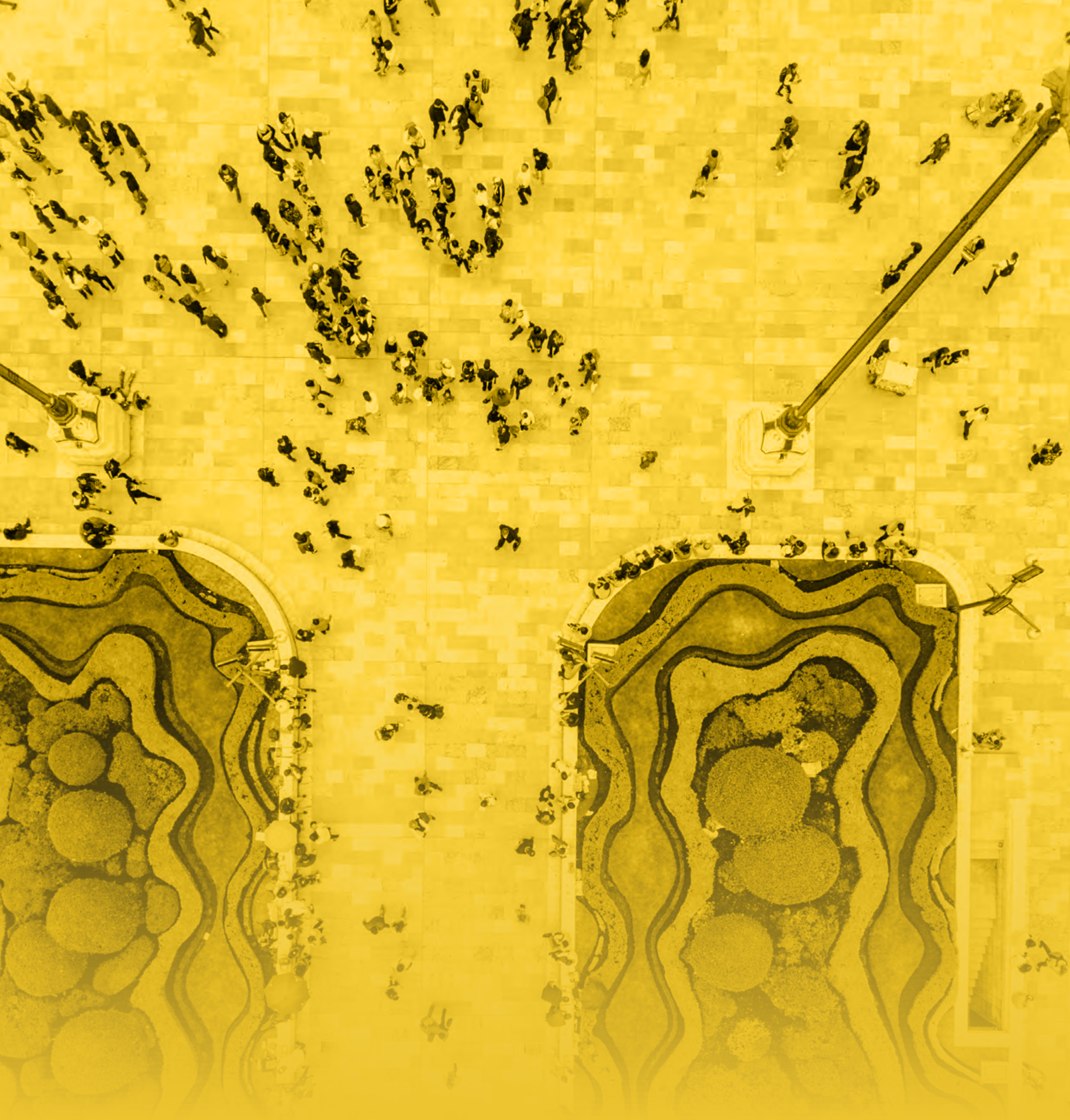
Before you enable people, you have to enable the system that they're going to be part of.

It would be the same thing as drivers of automobiles—they can't go anywhere unless they have roads to drive on first.

Here's another example I'm fond of. In the last 50 years, people really wanted to travel—to see the world, take beautiful vacations, see the sights. What did we have to do to enable tourism? We had to build an unbelievable infrastructure around the world, which meant an entire network consisting of thousands of international airports. Building an airport is a tremendous undertaking. Not only do aircraft landing and taking off have to be accounted for, but also the millions of passengers entering and exiting the airport, and the restaurants and shops to take care of them. An airport is almost like a small city—and if you're going to enable tourism in your country, you have to build this infrastructure.

So sales enablement begins well before people. First there are processes, then automation, then integration of automation, then policies.

When all that is in place...we can take the next step!



“Don’t expect to be motivated every day to get out there and make things happen. You won’t be. Don’t count on motivation. Count on Discipline.”

— JOCKO WILLINK

3 NOW WE COME TO PEOPLE

Once processes are up and running, we get to people.

Which people are we talking about? Well, that would be the sales reps, the people who perform the work. The traditional technological approach of only enabling executives by providing analysis of salespeople—a very top-down approach—has not produced good results. It perhaps worked for a short time, but salespeople became tired of being "driven," and we've seen in the last decade an amazing rate of turnover in sales positions. Salespeople switch jobs about every 18 months or so.

World citizens didn't much like this approach, either. In a larger example the totalitarian top-down model of communism was finally blown apart with the dissolution of the USSR in the early 1990s.

What Needs to Change?

It's not that I don't believe that perfect metrics and perfect reporting tools for salespeople aren't needed; I believe they are. It's just that leadership needs to take a different approach. That approach is the enablement of the salesperson as opposed to the traditional approach of enabling the executives to ride herd on the sales force.

This line of logic is what led us to evolve the term *salespreneur* here at Pipeliner. Salespreneurs are "entrepreneurs within the enterprise." They don't always feel like entrepreneurs, though, especially when they're not treated that way, but instead like workers. They must be enabled in the entrepreneurship approach.

Of course, on a very basic level, we're *all* entrepreneurs. At some point in our biological existence we were all sperms in fierce competition to reach the egg. And we won! But then we grew up, encountered resistance and then (some of us) became reluctant to really succeed. The entrepreneurial spirit can carry a person along to a sales position—but that spirit can be seriously dampened or killed in a company by strict rules, regulations and orders.

In the long run, I think that people who treat salespeople this way are trying to turn them into machines, and in the end, believe that machines will replace them. If that's the end you're really going for, great, but in complex sales—such as in B2B—it will never happen, as live salespeople will always be required. Therefore salespeople must be self-aware, have business acumen, and must be empowered to have insight in critical situations. These are far from machines.

Empowerment

One of my colleagues, Tamara Schenk, Research Director at CSO Insights, wrote that "sales enablement orchestrates all enablement services along the customer's journey, to ensure consistency and effectiveness."

I don't disagree with Tamara here, but I would like to amend her statement just a bit. I would say that sales enablement *empowers* salespeople—it doesn't orchestrate. Orchestrating is actually management, so first you must empower the salesperson, *then* you must orchestrate. Empowering is an individual activity, for the person's spirit, mind and entrepreneurial approach. Once salespeople have been empowered, freed from being weighed down by the top-down approach and from too many cumbersome rules, and enabled with the right tools, *then* comes the orchestration of all the other functions in the company.

Utilizing Strengths

One common management error that has been traditionally made—and made with sales as well—is that of trying to strengthen weak points. Renowned economist and management scientist Fredmund Malik, who's methods we follow here at Pipeliner, stated that the only way to create a strong team is to *utilize strengths*. In other words, you bolster up the strong points, you don't try to strengthen weak points. You cannot enable people in areas where they're weak. Find their strengths, though, and make them stronger, and you'll be far more successful.

Many sales trainers focus on "motivation," which is basically the same flaw—they're trying to strengthen weaknesses. Here's the bottom line: if you have to motivate a salesperson, you might as well get rid of them. Send them home. A person can only motivate themselves. You're not paying them so you can motivate them. Get someone who is willing, and who motivates themselves to get going.

Laziness is a different thing. If someone is being lazy, you can empower them by showing them that laziness isn't helping them reach their goals.

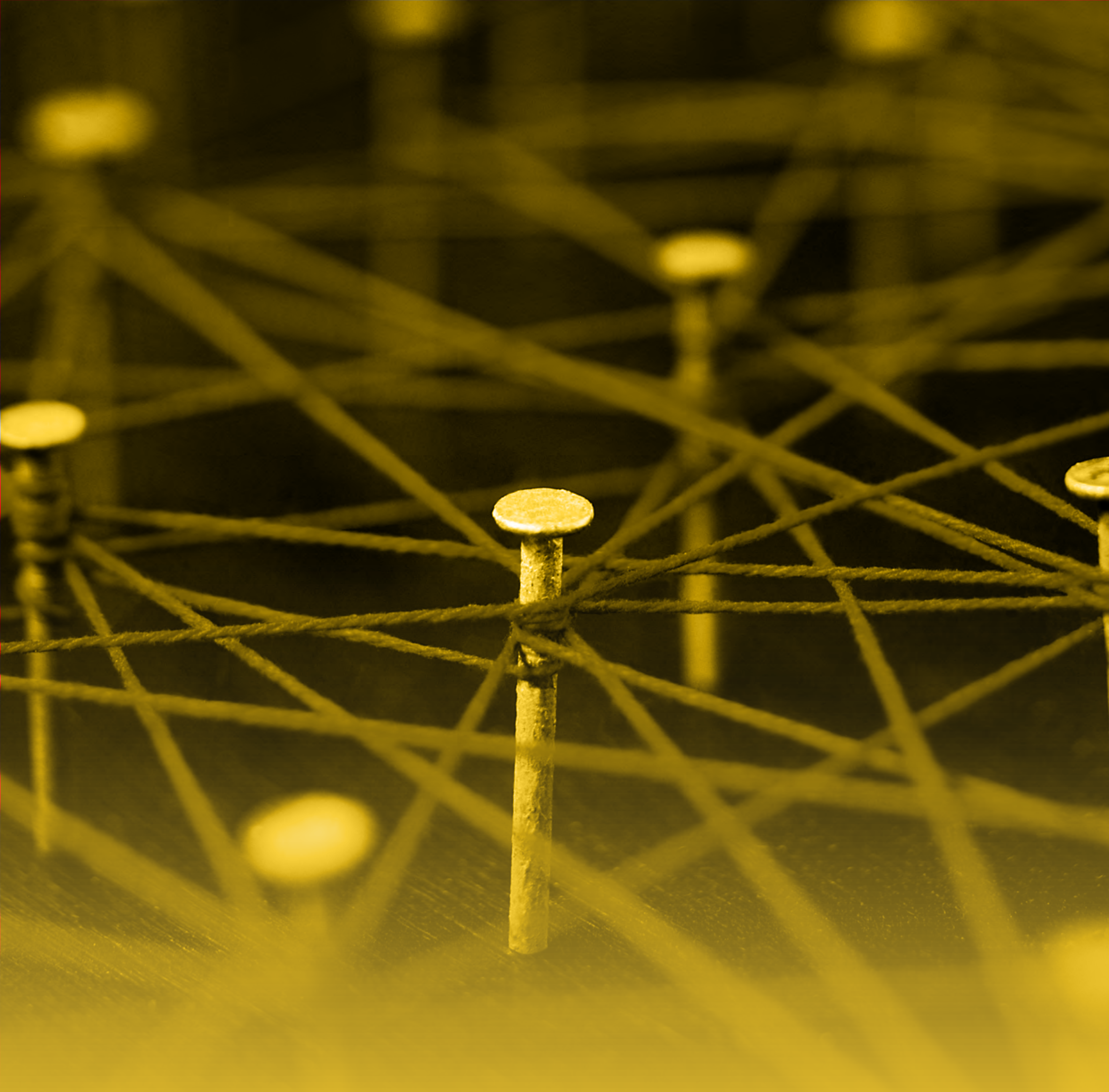
But just as you cannot change people, you cannot strengthen their weaknesses, and you can't motivate them. Don't waste your time. It's just like trying to take a swayback nag of a horse and turn it into a champion to compete in the Kentucky Derby—don't be surprised at the best result you get is finishing next-to-last at some bottom-class race in the Utah desert.

Coordinated Effort

At the end of the day, sales enablement is certainly about coaching, training, learning to engage the seller, and definitely about having metrics and the right technology. But it's all for nothing if all these elements don't work together in harmony.

Do we need more advanced technology, better systems, better reporting, better metrics, better engagement? Certainly we do, and at Pipeliner we already lead the way in many of these areas and are working constantly to make them better. But technology must be supportive—as I said earlier, it will never replace humans, especially in complex B2B sales.

Yes I agree with Tamara Schenk that sales enablement makes the difference in selling. But sales enablement, the empowerment, should happen first before the orchestration—the management—occurs in a company.



"It is essential to have good tools,
but it is also essential that the tools should
be used in the right way."

— WALLACE D. WATTLES

A REAL SALES ENABLEMENT PLATFORM

The Right Tool

There is generally only one tool that will be effective for the job. For example, if you're going to hang a picture on the wall, you could possibly use many different tools, but if you don't want to ruin the wall, your fingers or the picture, you will use a hammer. But it won't be just any hammer—if you go to the hardware store, you'll find many different kinds of hammers. If you needed to, say, hang 200 pictures in 200 motel rooms, you'll select the right hammer for the job.

For sales enablement, just as with any other endeavor, you need the right tool to fulfill the task. In my opinion there is only one tool for sales enablement, and that is Pipeliner CRM. I'm not just bragging—I really believe it. Because what do you need for real sales enablement? To truly organize a sales team, you need instant dynamic visualization. You need to have an instant visual representation of the workflows, both for the team and for individuals. You need to know at any moment where anyone stands in relation to their sales target. Otherwise, how is it done?

A constant flow of data is required. That data must be automated, and also must be integrated into other systems.

Pipeliner is already the most usable tool out there. Especially in comparison with traditional CRM solutions (you know, the big boys), Pipeliner is one that salespeople will actually use, and even enjoy using. It's the one they would select for themselves.

Functionality

Pipeliner is the most visual CRM on the market today—and in fact offers 5 different visualizations of opportunities:

- **Pipeline View**, which horizontally represents your opportunities as they move through the sales process
- **Bubble Chart View**, a 3D representation of your opportunities: sales process stage, estimated close data, and deal size
- **List view**, a traditional listing of deals, which also allows inline editing
- **Compact View**, which allows you to view a deal at a glance
- **Mapping View**, which displays opportunities geographically

In addition to these views, there are many different filters you can apply to view deals in many different ways. You can view activities related to teams, cohorts and regions, or related to specific products.

The Dynamic Target Feature allows salespeople and sales management to view the sales target exact as it presently stands, so that they're consistently motivated to reach that target. On a broader scale, a whole company is organized around making the target. It's not just sales, it's marketing as well, who assists with setting goals and providing materials to help meet those goals.

In any of these views or filters, users can quickly and easily generate an instant report, so that a particular situation, good or bad, can be documented and action taken upon it if needed.

Strictly Sales Enablement

While not originally categorized as a Sales Enablement Platform (SEP), Pipeliner CRM has always had as its primary mission the empowering of salespeople, and greatly succeeds at it every day. This empowerment comes about through our complete visualization—our UI—which is a total expression of how salespeople think, making it easy to follow and engage. We know our concept is correct simply because salespeople love it and adopt it.

This adoption is vitally important on a sales management level as well. Sales managers not only must provide their teams with a working tool, but one which salespeople will actually enter data into and use. Traditionally utilization and therefore data entry into CRM was a constant problem. "CRM sucks" was the mantra about CRM, which I knew from the beginning would be a challenge in creating Pipeliner CRM. We therefore worked to enable salespeople right from the start. Therefore Pipeliner is, in our opinion, the best SEP out there.

Here are 3 of our most powerful features, extremely pertinent to sales enablement:

1. THE ARCHIVE.
In life, do we learn more from success, or from failure? It's one of the hardest lessons in life, but we tend to learn more when we lose, when we don't succeed. It goes further—when someone is confronted with the same problem over and over again, it means that there's some lesson they haven't learned. They'll keep having that problem until they learn that lesson.

This is why we put the Archive feature into Pipeliner. The Archive, where all lost deals are stored, shows you exactly why you're losing, when you're losing, who precisely is losing, and in which stage of the sales process deals are lost. You can turn these "lost reasons" around, and greatly boost your success rate.

2. THE DYNAMIC TARGET.
Another very important feature for enabling the salesperson is Pipeliner's Dynamic Target. In the primary views within the product, the salesperson's target is always in view, right in front of the salesperson. To provide complete understanding, there are five different target views:

- **Unweighted Sales Target:** The value of all opportunities in a pipeline without any closing probability percentages. This can be useful if you have some historical data that says, for example, that a rep closes 10% of all opportunities. You would look for the Unweighted Sales Target to be at least 10x the goal.
- **Weighted Sales Target:** The Weighted Target is equal to the sum of the total opportunity values in each sales stage, multiplied by the probability of closure for that sales process stage.
- **Ranked Target:** Each rep has the ability to apply a personal ranking to each of their opportunities, from one to five stars. The Ranked Target shows their level of confidence in their opportunities.
- **Balanced Target:** The Balanced Target can be looked at as a "worst case scenario," because it balances the weighted pipeline and the ranked pipeline.
- **Real Target:** The Real Target.seitinutroppo nowro desolc lautca eht stneserper

3. ELIMINATE SPECIFIC OPPORTUNITIES.
Another outstanding feature is the ability to eliminate specific opportunities from the target. A salesperson may not be sure of a specific deal will close, and so can eliminate it from the target to see what the target will look like without it.

Tools Related to Tasks

Now we take the next major step. Here I quote management consultant, educator and author Peter Drucker, who said, "Efficiency is doing things right; effectiveness is doing the right things."

You have selected the tool which will be effective—but when you know how to skillfully accomplish the task with that tool, *that* is efficiency.

All of Pipeliner's functions allow salespeople and sales management to engage in their specific tasks efficiently, by using the right tool—in other words, to be truly efficient.

Making Tough Decisions

Throughout the sales process, salespeople must make tough decisions when it comes to opportunities. Pipeliner provides three primary ways to assist in making such decisions:

1. As mentioned above, a salesperson can exclude a particular opportunity from the target, to be able to see how the target would change if that deal doesn't close.
2. Opportunities can be labeled as to their fitness: Green for fit—meaning it's on schedule to close and there are no issues with it. Yellow, for deals that need attention.

Red, for deals that require action because the closing date has passed or there's an overdue task related to it. Such labeling allows the sales team to remain focused on the right deals, so that they're not side tracked. Managers can keep their salespeople focused on the correct priorities. Since labeling is dynamic (as is everything with Pipeliner), it also shows which deals have shifted in priority, which may fall off for this sales period, and also those which will make it.

3. If a deal is stalled, you can go and view Pipeliner's Buying Center, which is a visual relationship map for any deal showing all influences on the opportunity. You might discover that someone with influence on the deal is actually against it, so you can approach them directly and change their mind. In such a case, simply sticking with a single contact—wining and dining them or what have you—will never result in a closed sale.

Decisions are constantly made by monitoring the system. This is done in many ways, but the most rapid is with the Navigator feature which provides your first and most instant look into opportunity tracking. You can also set up notifications so that you'll know right away when a status changes or if something goes off-track.

Developing a Team

Pipeliner also assists you in developing a sales team, by allowing you to evaluate their strengths and weaknesses. As discussed in the last chapter, you should primarily evaluate personnel for their strengths, and work to make them stronger—trying to strengthen weaknesses rarely works. You can have someone who is an unbelievable "hunter" (one who finds and brings in potential deals) but is weak on closing. Maybe you could pair that person up with another who is great at closing, simply because it's rare to find someone skilled at both.

Combination: Tools and Tasks

To sum up, without the right tools you will not be able to enable a sales team to perform the right tasks. Of course, you need to engage them on the right tasks, too—otherwise all the great tools in the world won't help them succeed.

The magic sauce consists of the right combination of tools, tasks, people, processes and data. That is why you need just the right sales enabling CRM solution today, because without it, you're lost. Provide people the right tools for the right tasks, to manipulate data through the right processes that you have developed—and that is sales enablement!

“Your competitors can copy your product or service, but they can't copy the relationships you build with customers.”

— BRIAN GOONAN,
Partner at Ernst & Young

TODAY'S SALES ENABLEMENT

A corporate viewpoint is often taken that sales is a "simple" job, and that salespeople aren't truly knowledge workers. It is often said that "people who don't succeed elsewhere end up in sales." It's an incorrect characterization, because we know that a third of the world's population is engaged in sales-related jobs.

When you really take it seriously and understand it, sales is actually a very complex job. It's not just the technology salespeople must understand, but the sales processes. Additionally there are many factors a salesperson must fully learn: human beings, communication, presentation, and negotiation.

Salespeople must also learn to overcome the regular rejection that just doesn't exist in other professions. It can often happen that opportunities on which a salesperson is working for considerable time are lost. Dealing with rejection is something salespeople must thoroughly learn, in addition to the knowledge of the job.

If we really identify salespeople as who they are—knowledge workers—they would gain a different status in society. They are not viewed this way currently, often viewed as greedy, pushy people who couldn't have a career anywhere else.

Helping Through the Transformation

The enormous transformation spoken of by Austrian School Economist Fredmund Malik and myself for many years is now happening.

The pandemic has pushed the digital world 5 years ahead all at once. We need more knowledge workers who understand how to work with remote teams and processes. Our aim is to help salespeople get there.

All of this is impossible without digital hubs and communication tools. I would even predict that, in the future, it will be impossible for a company to survive without a sales-enabling CRM tool.

The Sales Process

A salesperson cannot function without a sales process, and it is the job of the salesperson's sales manager, or the company itself, to define that sales process. It's not just the basic sales process stages; that's the easy part, and just the beginning. The real insight comes about in assisting salespeople in the specific actions of each step, what they should and shouldn't do. These actions need to be made part and parcel of the technology involved.

As I stated earlier, you can operate a salesperson like a machine. In a factory, let's say one in which cars are manufactured, you have a computerized assembly line.

Each step of the manufacturing process is totally automated, from the chassis on up through the body, and it's all laid out exactly. But sales cannot run this way. Each action must be evaluated for its own application, because sales is a dynamic activity. It is constantly changing. It's not just a matter of pulling documents together, it is a matter of gathering and applying intelligence. It's not just a matter of using a particular sales methodology, because such a methodology has to be applied for each stage of the sales process. And all of this is going to be different for each industry and company.

Buyer's Action, Seller's Activity

Due to the dynamic nature of the sales process, at Pipeliner we created a functionality for Pipeliner CRM called the Buyer's Action and Seller's Activity. This functionality means that a seller only proceeds with various activities when they are based on the buyer's actions.

With a feature such as Buyer's Action and Seller's Activity, the seller can never move an opportunity or take action on it, unless the buyer gives the seller an indication that they should do so. That indication can be a particular type of signal. Using an example of a car dealership, let us say a buyer comes in and says they're looking for an SUV. They tell the salesperson that they have a family of 5, along with a dog. That's certainly a signal to the seller that this person is a qualified buyer for an SUV.

The biggest mistake a seller could make in such an instance is to take the customer over and show them a 4-seat sports car, simply because the seller makes the best profit and commission on it. The seller, in such a case, is ignoring the buyer's signals. People reading this article might say, "What a stupid salesperson!" But events like this happen every day—the seller makes moves that don't match what the buyer is telling them.

With the Buyer's Actions/Seller's Activity, the buyer must provide such signals before the seller proceeds along the sales process. Of course the seller can ask questions to clarify the buyer's intentions. But as the seller proceeds, they formulate the activities they should engage in.

Pipeliner is the only CRM—and the only SEP—to bring this functionality right into the sales pipeline. This is true sales enablement, because you are truly guiding the salesperson by providing buyer signals to watch for, and providing a path to follow once those signals are received. Additional guidance can be provided to the salesperson in documents attached to that specific sales stage.

With our Automatizer feature, we took it one step further, making it possible to automate various seller activities with a single click. This could be something such as generating an email with an attachment, or sending over a video. At the same time a reminder would be placed in the salesperson's tasks for follow-up.

Data Analysis and Use

When considering sales enablement, the focus should be on the full overview of the prospect or customer. In my opinion, sales enablement hasn't so much to do with the generation of a lot of data, but the understanding and analysis of the data. Not only that, but what should that data trigger? What should the sales rep do with it? The answer to that might even be, nothing at all. It could be that the best "action" would be to rest for a while and allow the prospect to look over all the data you have sent them.

We live in a society that is completely overloaded with data. We have more technological systems than ever, but less insight than ever. Are people making intelligent decisions with data? Just take a look at the chaos around the world, and the pandemic. Intelligent use of the data, I think, would not have allowed us to sink so far down.

It's not about the amount and sophistication of the technology you have, but how you utilize it with processes.

The Pipeliner Example

In Pipeliner CRM, a mouse-over of a particular sales process step will show, for the current sales period, the value of opportunities open and lost in that particular stage. You can see the time an opportunity has spent in that sales stage, and know if you are ahead of or behind the average.

You can then take a look at the loss rate—what percentage of opportunities have been lost from this step? You can then also see the percentage of opportunities converting into the next sales process stage.

As far as a sales enablement platform goes, no vendor other than Pipeliner CRM has this powerful combination of benefits: the required activities for each stage, the capacity to attach needed documents to each stage, the detailed but important analysis points for each stage, and the ability to automate and create manual triggers for sales tasks.

That is real sales enablement!

**“In my opinion, the future of mobile i
s the future of everything”**

— MATT GALLIGAN,
Co-founder of Circa

6 MOBILE PLATFORMS AND VIDEO CONTENT

When it comes to sales enablement, the importance of mobile devices cannot be overestimated. Today mobile and tablet devices outnumber desktop devices by a factor of 13 percent worldwide according to one source (note that iOS and Android applications are also immediately usable on tablets—it is the same technology). We know from our own experience that in emerging markets, mobile devices are used to pay for goods and services, navigation, and for many other things besides calling, texting and surfing the web.

At Pipeliner, we've seen this trend occurring over the years, and even expressed our vision in an ebook. Following this line, we have invested our programming resources heavily into our mobile platform development. We not only imported capabilities for leads, opportunities, accounts, contacts and all other entities, but developed powerful and playful dashboards. Beyond that, salespeople now have the same detailed processes on their mobile devices that they utilize when selling directly.

That means salespeople can track and maintain concentration on all details of a sale. We not only label opportunities for focus, hot or stalled for immediate action, but we lay out the path for the buyer's action and the corresponding seller's activity, totally integrated into the mobile form. That means that a salesperson has, literally right in the palm of their hand, guided selling. No other CRM offers this kind of functionality.

Another Pipeliner exclusive is our Voyager AI functionality, which provides instant details for analyzing a salesperson's productivity—winning percentages, efficiency, sales velocity and more. Voyager encompasses opportunities, accounts, contacts and leads, as well as calendar (Google or Outlook) and tasks. With Voyager, a salesperson can view, right on their calendar, their workload and productivity. From the management side, sales managers can analyze and compare different users over any sales period.

Exponential Power

Mobile technology has certainly come a long way. 2G, which came about in the last decade of the 1990s, really began the digital revolution. It was the first time we had functionality beyond voice, going into data transfer.

The power of 3G inspired Steve Jobs to delve into the development of the smartphone, and Apple created what was really the first of its kind. 3G brought about a rapid increase in wireless technology, because now it really went beyond the mere phone call. For the first time mobile users could surf the web, experience multimedia and even watch videos. With 3G, though, it took 26 hours—more than a day—to download a 2-hour movie. Nobody, therefore, was using that particular functionality.

4G really meant the whole world was in a person's pocket, with a plethora of useful applications, many of them free. We had the capabilities of ride service. We lost the need for built-in navigation systems because we could now navigate with our phones. The power of video was never more apparent than with the explosion of apps such as TikTok. And that 2-hour movie which took 26 hours to download with 3G could now, with 4G, be downloaded in 6 minutes.

Now we have reached 5G, and will probably remain there for the next 10 years. 5G means the first time you can directly connect from your smartphone to other internet-enabled devices such as appliances, security cameras, vehicles, doors, and many more. And that 2-hour video that took 26 hours to download with 3G, and 6 seconds to download with 4G, now only takes 3.6 seconds.

Video Content

Video content, which has proven itself critical for sales, is now wholly enabled on mobile platforms. At Pipeliner we have seen this importance, we have been continually producing mobile content for a number of years (check out our YouTube channel). These videos not only demonstrate our CRM features, but now act as tutorials to instruct users. Video is now a top method for engagement with prospects. Salespeople can send a short video and immediately engage with future customers.

Additionally, we are now providing all of our SalesPOP! online multimedia content—video, ebooks, blogs, podcasts and more—through our SalesPOP! mobile app. It's a wonderful way for salespeople, sales management and others in the industry to stay up-to-date on the latest sales trends and technology.

The Mobile Future is Here

I find it fascinating that my prospects and customers are following the same trend as my 11-year-old son—they are incredibly involved with mobile technology and really use it. It's truly a mobile world, and we remain right with it, helping build it and making it more powerful.

"Your buyers want to work with salespeople who have empathy for them, who understand their roles and challenges, and who can be prescriptive in helping them."

— MARK LINDWALL,
Senior Analyst, Forrester Research

7 THE REAL MISSION OF SALES ENABLEMENT —AND THE FUTURE

We seem to have a different concept for Pipeliner CRM than other developers and vendors have for their CRM offerings—for we believe that CRM in itself should empower salespeople. It doesn't make sense from a financial or any other standpoint to have a "Sales Enablement Platform" (SEP) in addition to CRM. We have therefore now placed our solution into the SEP category, for it is totally a sales enablement solution and belongs both in that category and the CRM category.

Promoting the misconception that companies must have a whole other tool in addition to CRM also creates confusion and uncertainty. Only effective execution of the right strategy, and efficiently working on becoming better at it, brings real productivity. And productivity, of course, leads to profitability.

What is the actual future of sales enablement, then? In which direction should it go?

Orientation

Some CRM or SEP solutions orient themselves on their particular sales communication or company. In my opinion, this is a wrong approach—the orientation of such a solution must be on the automation, because this is what makes sales enablement impossible. Automation is the intelligence itself.

As an example, a company could have multiple product lines. One is for a complex product, and the other is a consulting line, a service. It is the core technology that makes multiple pipelines possible. It is the technology that supports the methodologies, and each of these pipelines would have very different approaches. "Methodology" could be defined here as the various processes, and their precise steps, that salespeople should take as they sell.

Methodology requires a technology that is, at any time, constantly easy to adjust. This requirement exists for no other reason than this: we are in an age and time in which everything is constantly changing. No one can accurately predict what changes will occur even within 6 months. Therefore any technology must be flexible, agile, easy to adopt, must have the capacity for information to be easily exported and for changes to be instantly communicated to users. Any system that is unnecessarily complicated results in decreased sales production.

Old and New CRM Concepts

There are 2 distinct concepts, when it comes to CRM, which could be labeled "old" and "new." The "old" concept is the traditional approach of SAP CRM, Microsoft Dynamics, or Sugar CRM.

It consists of heavy, overloaded technology in a large framework, with which you can perform an enormous array of functions. It requires an expert, often a consultant, to analyze the application for a company, adjust it for that company and its users, and constantly adjust it for any changes. To make a humorous analogy, you could say that you're going to have this consultant virtually sitting on your lap as long as you have this solution, and earning a great deal of money for doing so. Once a company has bought into such a platform, they not only pay a premium price for licenses, but they also pay handsomely for these consultants.

Adoption is another major problem—it can take anywhere from a couple of months to over a year for these traditional CRM solutions to be adopted and learned by sales teams.

The new concept is that salespeople and administrators instantly and easily learn precisely what they need to know about a CRM, as they need to know it, because it's designed that way.

These systems are agile, and can have adjustments and incremental changes rapidly made whenever they're needed. You no longer need to have a consultant "sitting on your lap." In fact, one of the major benefits for today's CRM solution is that the middleman—this consultant—is totally removed.

These 2 concepts can be compared to old and new concepts in software development. The "old" is the waterfall development method, in which code was created as one giant block, and as development went forward it could not be changed at all. The "new" is scrum development methodology, in which individual teams create iterations of the software.

Another comparison could be made for the old technology is Microsoft Excel. While it is the best-selling business application in the world, it has so many features that no one ever comes close to using them all. In fact, it is said that 95 percent of Excel users use 5 percent of its functionality. Excel, though, is relatively inexpensive compared to one of these behemoth CRM platforms—and it's a sad statement that a company's users will only use a fraction of the functionality a company pays so dearly for.

What Is Really Needed?

The world is moving and changing at lightning speed. Today companies need to stay on top of everything, adapt and change as rapidly as commerce changes. One highly efficient CRM solution—such as ours—will allow enterprises to do that. It makes no sense to introduce complexity by insisting that another solution must be entered into the fray. Why, when salespeople can be perfectly enabled with the right single CRM solution?

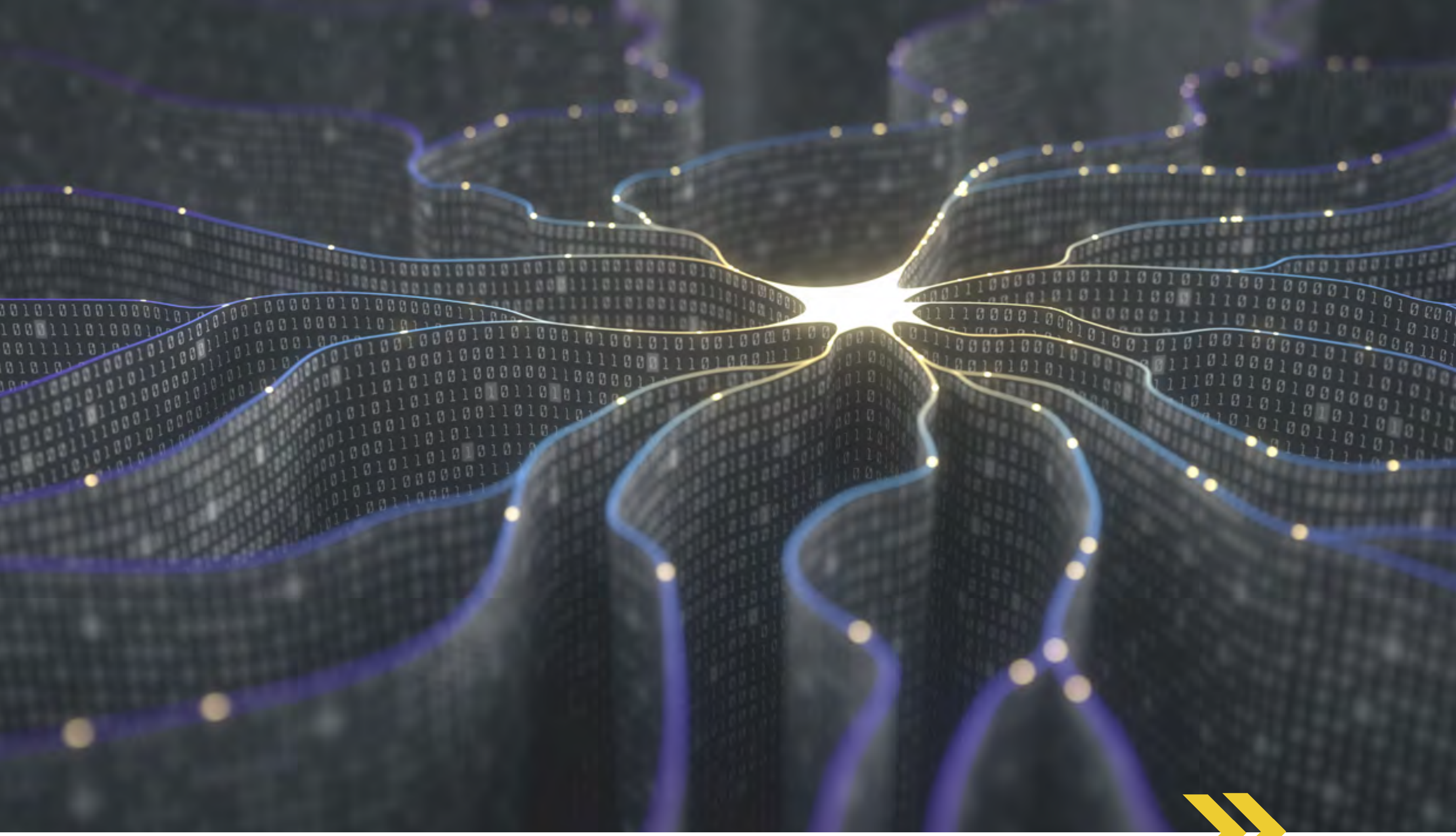
The right CRM application makes intangible factors tangible. It also makes it possible to embed intelligent automation and documentation into processes, truly guiding salespeople through each stage of the sales process, so that they can take appropriate activities in response to buyer actions.

The Artificial Intelligence Myth

There is a considerable difference between the kind of automation we've been discussing and the "artificial intelligence" being promoted by some CRM vendors today. Since some of these new "SEPs" are AI-based, I should say that I honestly believe that the claims being made for AI in this area are, plainly, nonsense. The "state" of AI is clearly not all it's cracked up to be when Mark Zuckerberg must hire 20,000 people to manually identify and remove harmful content from Facebook, because AI tools aren't capable of it. If Facebook, with almost unlimited resources, cannot accomplish such a thing with machine learning and AI, AI certainly cannot be counted on for more complex sales situations.

In order to be effective at all, AI requires massive amounts of data from which to analyze and learn. Most companies don't possess this amount of data, or even have access to it, which means that AI is going to be fairly useless. This promotion of "AI-enabled CRM" is, for the most part, another effort to confuse buyers and users. We at Pipeliner have incorporated AI (called "Voyager) as one feature, but it has a specific use and utilizes the data easily available from CRM.

To further confuse the issue, Salesforce has branded its AI offering as "Einstein." This is truly incorrect, as Albert Einstein, for whom this functionality is named, was a theoretical physicist who developed the theory of relativity, among other things.



Yes he was a genius, but he had nothing to do with computers, cybernetics or the development of AI. This is truly a misnomer, and another way to confuse customers.

Needed Clarity

Honestly, I feel this kind of promotion and marketing is an effort to mislead people. It's not a smart thing to do, as people in the current environment are already suspicious of information they receive through the media. For example, just try and make sense of covid19 statistics—they are conflicted and confusing.

What people need is clarity. Only when information is clear and can be easily understood can information be properly absorbed and utilized.

Clarity is the reason airports throughout the world all utilize the same symbology, the same icons, to guide and inform travelers speaking all different languages. No matter where you land in the world, you can always follow the symbols to the baggage claim. Can you imagine what a calamity would ensue if every country used different symbology in airports? Luggage would be forever lost everywhere.

Coming back to sales enablement, clarity must be utilized in all applications so that salespeople—and others in sales-related roles—can easily use applications, and clearly communicate with each other.

As regards clarity, we could draw a comparison to open source programming. I have been an advocate of open source programming since long before it was fashionable. I worked with the government in my home country of Austria, showing how open source could positively benefit. Microsoft publicly spoke out against my efforts back then—yet now they have purchased the world's largest open-source community, GitHub, which means they turned completely around from their misconception. Open source is a perfect example of transparency. If it weren't transparent, one programmer couldn't tap into the work of another, and contribute to it.

You could even say clarity leads to safety, because with clarity in data you can be safe in your decision process.

The Core of Every Company

For the future, the core of every company—its operating system, if you will—is CRM. Why? Because without highly accurate customer data, every company is dead. As we discovered in the pandemic, if you have no customers, you shut down. But even with a digital company, if you don't know who is interacting with your product and when, you're also dead. CRM is the key.

At Pipeliner we certainly know this. We're not trying to put ourselves in every business—we're concentrating currently on companies that have in-house salespeople and sales management. Not every business requires a sales staff, such as businesses that sell straight to the consumer. We're even supporting those kinds of businesses conceptually, though, through our online multimedia magazine SalesPOP.

CRM, when its data is properly arranged, provides clear insight into the customer. That means a business can (as it must) be customer-centric and service-oriented.

The Power of Salespeople

Such clarity means that a salesperson can be what they were meant to be to the society—wealth-creating and peace-producing. In the broader view, salespeople, in strengthening the economy, help to strengthen the middle-class, which is sorely lacking today.

A salesperson is free to choose what products or services they are going to sell. They can sell destructive products, or decent ones. When they sell products that actually help people, they create a safe society.

Such choices are made with sales wisdom. What is that wisdom? In a network community, which is what we live in today, wisdom is altruism. It means that the person you sell to, while they may not be your best friend, is at least made to feel like your friend. You're not dishonest with them. You're working for today's sales currency—a recommendation.

Honestly, I believe that it won't be the politicians who finally bring peace to our society, but the salespeople who understand they are the game-changers, the agents of happiness.

In the end, a salesperson's product is the creation of an environment in which we can all live together, where our kids can grow, go to school, and we can all, once again, have a decent life.

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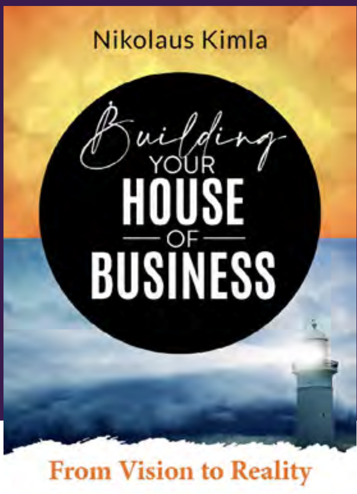

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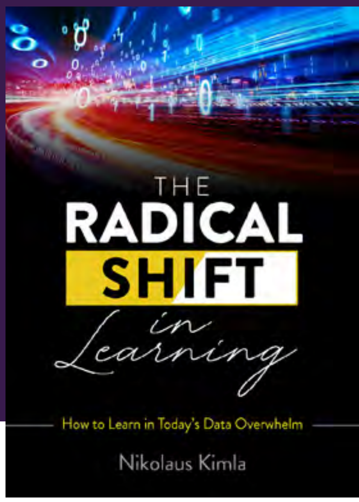

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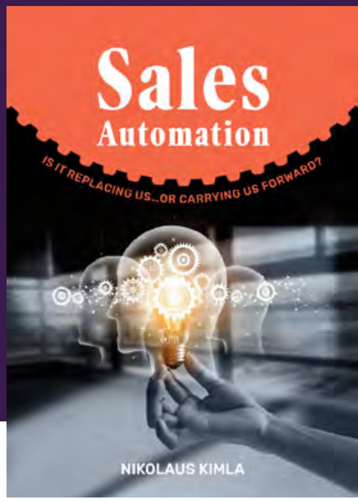

SALES AUTOMATION: Is it Replacing Us...or Carrying Us Forward?

SALES ENABLEMENT PLATFORM:
WHAT IT IS, WHAT IT ISN'T AND WHAT IT SHOULD BE

by **Nikolaus Kimla**
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A 30-year veteran of the computer industry, Nikolaus Kimla has founded and run several software companies. He and his company uptime iTechnology are the developers of World- Check, a risk intelligence platform eventually sold to Thomson Reuters for $530 million. He is the founder and CEO, developer and publisher of Pipeliner CRM, the first CRM application aimed squarely at actually empowering salespeople and sales management.

Also a prolific writer, Nikolaus has authored over 100 ebooks, articles and white papers addressing the subjects of sales management, leadership and sales itself.