

# **Need to Improve Salespeople's Behaviors? Don't Bother with Sales Training or CRM Until You Face the Facts**

By Michael J. Webb

Have you ever wondered, what is the best way to incorporate sales training methodologies in a CRM system? Sometimes the question comes when a company wants a better return from their CRM software. Other times it comes from a sales training company hoping to capitalize on “integration” of their sales methodology with some CRM software.

Unfortunately, both are after a wild goose they'll never catch.

Putting sales methodologies or training documentation in CRM systems is usually not too difficult. Naming process stages is pretty straightforward, so long as you catch the programmers before they start configuring. If you don't have to collect answers to questions or do anything with the data you collect, there is really not much to it technically.

Some companies have created elaborate strategy systems, with color-coded organizational charts and more. Yet no matter how fancy, salespeople won't use it very often.

If only the problem of getting salespeople to be more effective were a technical issue, all would be well with the world.

But it isn't.

## **Wishing Won't Make It So**

Unfortunately, NOTHING you can do to add training or sales methodology to the CRM will make much of a difference in salespeople's behaviors. The reason is that in most cases, you are adding work to salespeople's lives rather than value.

That is just a fact. If anything, simplifying and minimizing the details entered in the CRM are better than burdening it (and the salespeople) with lots of sales methodology stuff.

This is bad news for the CRM software and sales training companies, because it takes away some of their arguments for the value they offer.

That is unfortunate, but we can't help that.

### **Changing People's Behaviors Requires Changing Their Environment**

You wouldn't expect the output of a manufacturing process to improve by sticking some fancy labels on the manufacturing equipment, would you? If you asked machine operators fill out screens of information no one reads instead of making parts, would that enable them to produce more?

Of course not.

If you need machine operators to make fewer mistakes, you must mistake-proof the process. You make the jigs and fixtures that prevent them from doing things the wrong way. If you want people to produce more, you apply "5S" techniques<sup>1</sup> to clean and streamline their workspace. You minimize the motions required for them to do their jobs. You remove incentives and performance measures not aligned with the goals.

Most important, you don't expect a different outcome unless you physically change the process being implemented. You change the things that drive people's behaviors first. Then you look for changes in output.

When was the last time you streamlined the number of screens and clicks required for the salesperson to use the CRM system? (I once lost a battle with a CRM implementation team from

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<sup>1</sup> "5S" stands for "Sort," "Set in Order," "Shine," "Standardize," and "Sustain" (translated from the original Japanese). "5S" is a technique used in Lean manufacturing to improve quality and productivity.

SAP who argued it was too expensive to “cater to the sales force.” After their sales results didn’t improve, Motorola acquired the company.)

When was the last time you measurably improved the quality of your company’s leads, or made it easier to nurture relationships with prospects that were not yet ready to buy? How have you helped salespeople make more consistent decisions when prioritizing their sales opportunities? *These* are things that change results.

Whoever said, “Your process is perfectly designed to give you the results you are currently getting” got it exactly right. If you want different results, you probably have to change something you haven’t yet changed.

### **What Are the Facts?**

People’s behavior depends on their perception of reality. Therefore, the place to start is with the credibility of the terms people use in the sales process itself. Words such as “qualified,” “lead,” and “opportunity” must refer to observable facts ... evidence salespeople can be trained to recognize consistently. The more capable salespeople on your team probably already recognize many of these facts.

The classification of an opportunity as “qualified” can be “cut-and-dried” according to observable facts (“What did the prospect do or say?”... “What business or technical problems do they have?” “How important are these to the decision maker?” ... “How do you know this?”). When that knowledge is missing or the prospect has not yet taken the action desired, it can be clear what sales tactics or behaviors will achieve the goal most of the time.

These MEAN something to your team when they can be traced to “ground,” so to speak. When words to refer to facts, the list of “Qualified Opportunities” in the sales forecast has teeth.

### **The Role of Training and the CRM**

The role of the CRM is to help salespeople and their managers account for their leads, opportunities, and deals as if they were inventory assets (which is what they are).

Salespeople embrace this when they believe their company:

- understands and respects what it takes to move deals through the pipeline
- will hold them accountable for what they can control
- won't hold them accountable for what they can't control

This puts salespeople and their managers “on the same page” with regard to moving deals along successfully. It becomes apparent to everyone which skills and behaviors are needed, a condition that greatly simplifies the task of training. Most important, this vantage point enables everyone to see and measure the results of that training.

It also becomes much easier to identify time-consuming or repetitive tasks that could be automated in the CRM to make the best sales behaviors more mistake-proof, make them faster, and a path of least resistance as well.

## **Conclusion**

Salespeople's behaviors can't change until their environment changes in the following ways:

1. when the language of the process is clarified (traced to observable facts)
2. when the process has been shown to work a reasonable percentage of the time
3. when the CRM system's pipeline reports are based on grounded criteria
4. when salespeople use the CRM to manage their pipeline, because management has ensured the CRM makes it easier to do so
5. AND when management INSPECTS those reports and makes decisions based on them

THEN, and ONLY THEN will sales behaviors change in the way we in management need them to. Come to think of it, if managers aren't doing those sorts of things right now, what are they spending their time on?

**Biography of Michael J. Webb, President, Sales Performance Consultants, Inc.**

Michael J. Webb is the founder of Sales Performance Consultants, a firm devoted to helping senior executives who need to make their sales funnel flow faster. Michael delivered the keynote address to the first two conferences ever held on applying Six Sigma to marketing and sales. He has helped companies such as MAQUET, Replicon, Thermo Fisher Scientific, Electro Technick Industries, and many others to find more of the right customers at higher margins and lower costs by improving their sales and marketing processes. Michael is the author of “*Sales and Marketing the Six Sigma Way*” (Kaplan, 2006) and numerous articles.