"Skinny CRM"

$6.5 Million Sold in 30 Sales over 2 1/2 Years

Plus Penetrated New Marquee Account:

$5.5 Million Sale to Proctor & Gamble

15 Qualified Prospects = 5 Meetings = 3 Proposals = 1 Sale

Quantified Success Stories Communicate the Value of Service Offered

Narrow Focus on Qualified Prospects with Urgent Compelling Needs

Email Campaigns with Click Through Tracking

Weekly Prospect Pipeline Call Holds Sales People Accountable

Buy-in from Sales People Because They Built and Own the System

Sales Person Record Keeping 5 Clicks or Less Per Contact

Hot List Key Sales Tracking, Standardized Call Reports

Visual Order Tracking Keeps Sales People Updated with a Glance

Simple Time Tracking System Captures Costs, Produces Customer P&L

Dramatic Increase in Sales from Account Managers and Customer Service People

Custom Websites for Major Customers, Increased Sales, Improved Customer Retention

By Tom Ingram, PMP, CMC(e)

Imagine you are the General Manager of a $50 Million business that provides services to manufacturers and retailers. You do magnificent work for your clients and they are delighted but low barriers to entry in your industry make it easy for competitors to underprice you. Most of all, you find yourself saying, **"We do great work. Why is it so difficult to sell our services?"**

This case study attempts to briefly summarize 2 ½ years of work that Tom Ingram & Associates and this client did together to produce the results you see above. Wherever possible I have included links to samples of real working systems (with confidential information removed.) In order to completely tell the story of "Skinny CRM", I have also added some samples from other clients.

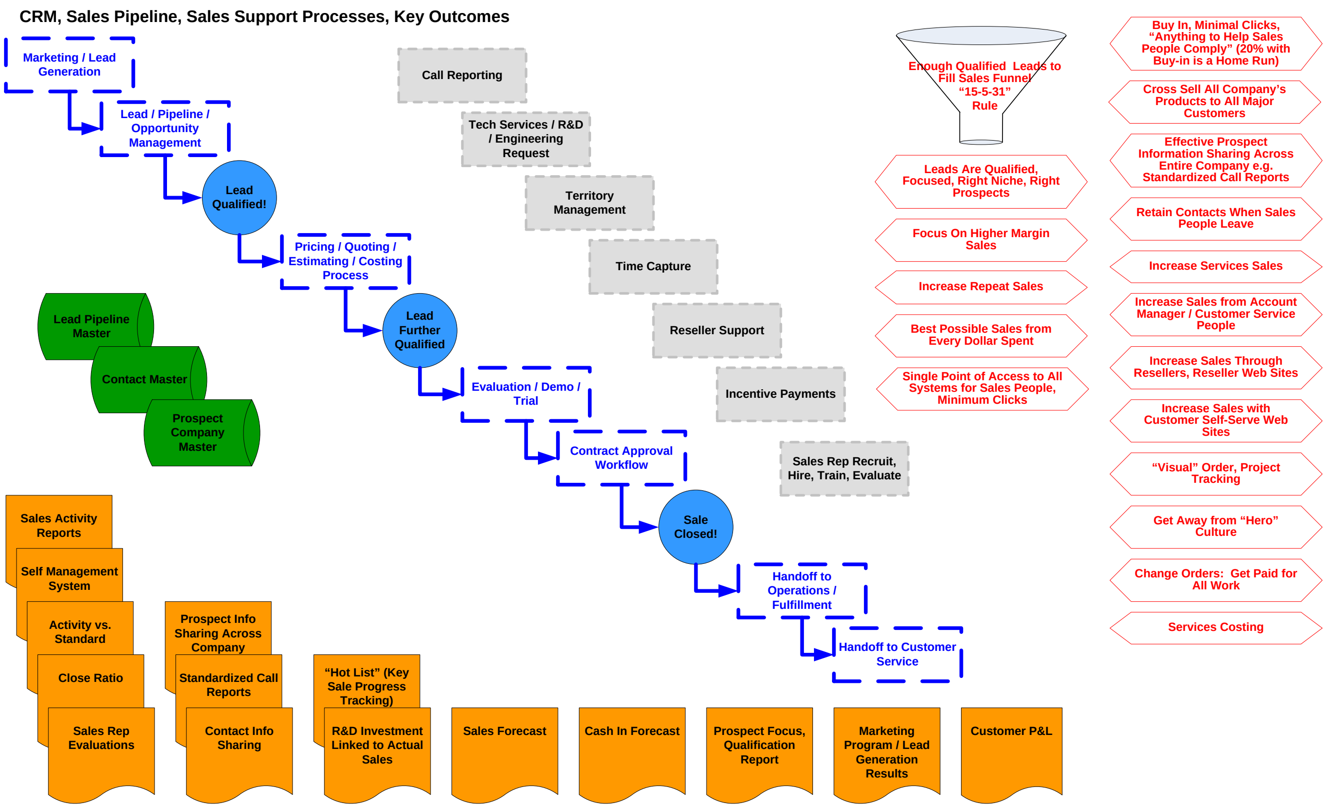
1. The Big Picture, Understanding, Industrial, Business-to-Business Selling: Figure 1.0 will help you understand some essentials of big ticket industrial sales processes. A major issue is that industrial selling often requires large costs in pursuit of orders. Note also in the upper right of Figure 1.0 the "outcomes" that most senior executives are interested in.

2. Begin with Results: **15 qualified approaches = 5 meetings = 3 proposals = 1 sale** The key outcome the client was looking for was a predictable, reliable method of generating enough sales to keep his business and his people fully occupied. This pipeline is a fundamental concept in selling.

3. Quantified Success Stories Communicate the Value of Service Offered: The results you have produced for previous customers is the best place to start. In this case we were able to document 23 quantified, tangible success stories where the company had solved urgent problems before.

a. Success Stories, See 23 Points of Excellence, Other Examples (CLICK for details)

Figure 1.0, Understanding How Industrial, Business-to-Business Selling is Different



4. Narrow Focus on Qualified Prospects with Urgent Compelling Needs: Staying focused on a narrow set of customers where you can provide overwhelming, compelling value is one of the most difficult challenges of business selling. The links below show some of the tools we used.

a. Target List of Prospects, Decision Makers **CLICK for PDF**

b. Focus on Right Prospects, Right Urgent, Compelling Need: Pipeline Sales Activity Time Tracking Report Samples With Focus and Urgent Need Meter

5. Email Campaigns with Click Through Tracking: The next step was emailing success stories to prospects and following up by phone. The following links show how click through tracking allowed us to focus sales time on the best prospects.

a. Email marketing and click through tracking Example 1 Best Results in 24 hours

6. Weekly Prospect Pipeline Call Holds Sales People Accountable: The client will tell you that the single most important thing I did for his company was establish a disciplined weekly call where we coached the sales people and held them accountable for spending their time on the right prospects.

a. Sales Activity Reports (Emails, Letters, Calls, Net Meetings, Face to Face Meetings, Proposals) CLICK HERE (PDF) for Pipeline System

b. Video How GE Does IT: The Weekly Sales Pipeline / Qualify / Sales Activity Measurement / Forecast System

c. Pipeline Sales Activity Time Tracking Report Samples With Focus and Urgent Need Meter

7. Buy-in from Sales People Because They Built and Own the System: Many problems with CRM systems arise because a big, complex, top-down system is imposed on the sales people. We prevented many of these problems by involving sales people in the design. Note that getting the record keeping job done with the fewest possible clicks was an extreme motivator for the sales people.

a. Minimal Clicks, Sales Rep Self Management Sales Person Record Keeping 5 Clicks or Less Per Contact CLICK for Video CLICK for PDF

8. Hot List Key Sales Tracking, Standardized Call Reports: Big deals, mandates to cross-sell to other customers within the company, special promotions, etc. always come up. Below are some examples of special case reporting.

a. RFQ to Close, Best of the Best, 1/0 Sales Rep Self Management: CLICK for Video CLICK for PDF

b. Standardized Call Reports CLICK for Video CLICK for PDF

c. Key Sales Tracking Sophisticated Reports Requiring SQL Server and MS Reporting Services CLICK for Video Advanced Database PDF Only

9. Visual Order Tracking Keeps Sales People Updated with a Glance: In some cases we were able to provide a graph showing the sales people status on orders…

a. Visual Order Tracking My Action Items Gantt Chart *CLICK for Video* *CLICK for PDF*

b. Visual Project Tracking Quality Defect Resolution *CLICK for Video* *CLICK for PDF*

10. Simple Time Tracking System Captures Costs, Produces Customer P&L: Industrial and business-to-business selling often involves expensive proposals, engineering, trial projects, etc. A simple time capture system allowed us to understand the true cost of pursuing and servicing prospects.

a. Time Tracking Time Capture System

b. Customer P&L, Only Possible with Time Tracking CLICK for PDF

11. Dramatic Increase in Sales from Account Managers and Customer Service People: This client had over half of his sales force in "account management / customer service" roles. The time tracking system and sales activity tracking system combined to produce the best results from these part time sales people.

a. Increase Sales from Account Managers and Customer Service People Pipeline Sales Activity Time Tracking Report Samples With Focus and Urgent Need Meter

12. Custom Websites for Major Customers, Increased Sales, Improved Customer Retention: This client developed over 70 websites for their top customers…

a. Software Actually Developed

13. Outlook to SharePoint Integration: The following illustrates how Outlook and SharePoint can be combined to save thousands of hours of sales time.

a. Sales Person Buy In Record Keeping 5 Clicks or Less Per Contact PART 1

b. PART 2

c. 1/0 Sales Activity Management PDF

14. Conclusion: 15 qualified approaches = 5 meetings = 3 proposals = 1 sale. *Click Here* to take one more look at the key result the client was looking for.

Our Disclaimers and Cautions: Please read the notes and cautions in this case carefully and contact us for details prior to any decision to purchase or invest in a project based on this case. This is a high-level summary of a complex effort and not intended to provide extensive detail or completeness. The goal is an overall understanding of capabilities and tools used. We make no representation that a similar outcome will be achieved for others. In particular, be aware that some Microsoft solutions are great, inexpensive, reliable and practical, while some have problems that are so severe they become impractical in certain situations.