

---

# An In-Depth Look At A Rep-Specific Software Package

Part 2

by GREGG MARSHALL

**L**ast month we looked at WinRep's method of delivering its software via an application service provider. This software solution maintains control of your cash flow while you avoid having to maintain a network server and/or remote synchronization issues. The latest updates are automatically installed, and you can access your data from anywhere in the world using Internet Explorer.

This month we'll look at what interests many reps the most — how WinRep's fully functional contact management system helps you to be more effective in your selling efforts.

When I've done MANA seminars over the years, there has been more interest in sales automation (a.k.a. contact management, customer relationship management, etc.) than in any other technology-related topic. That's because first and foremost, reps are salespeople. They recognize that if they can do a better job, they'll sell more, and if they sell more, they'll make more money.

That's why when reps are surveyed about software, they report that using contact management software is most important, sometimes even confusing it with traditional rep back office automation software. ACT! is the number one choice of most reps, followed by Goldmine, Maximizer, Sales Logix, and Empowering Systems. Why ACT!?! Because it is available in most retail software outlets, and it is easy to set up for single users and small networks.

---

## Support Sales Reps

---

The problem with most of the various contact management software used by reps today is they

really don't do a good job of supporting multiple-line sales representatives. They can't really handle sales data from multiple manufacturers, or for that matter, multiple lines within a single manufacturer. They don't have a way to keep track of information that would be useful to extract and report to the manufacturer.

The traditional rep office automation software companies incorporated minimal contact management capabilities into their software. Some have created kludges that integrate multiple line sales data into existing contact management note fields. Their emphasis has mainly been on the automation of sales and commission data.

***The problem with most of the various contact management software used by reps today is they really don't do a good job of supporting multiple-line sales representatives.***

That is until the latest release from WinRep Software. WinRep has incorporated most of the features of common contact management programs along with integrating the data normally collected by a rep back office system. Why is this integration important?

We received sales reports from the manufacturers. They were useful to a limit. For a multiple-person agency such as ours, with salespeople scattered over a 677,000-square-mile area, getting a report circulated in a timely manner was either very expensive or not possible. Consider the sheer bulk of the combined manufacturers' reports: our agency received about 4,000 pages of manufacturer reports per month! Over time we've found we tend to use our own reporting to identify "opportunities" and then use the factory reports to understand the details of why. The only reason to use the factory reports at all was that the data was too expensive to enter at the line item level.

### Working with Old Data

So what's wrong with this picture? We were taking printed data created on the manufacturer's computer, mailed via U.S. mail, and re-entering it into our computer. That data was then distributed first by paper report and then via diskette. It was slow and redundant. Our agency didn't finish receiving all the invoices for a manufacturer until the first week of the month following the invoice. Even when entering invoices as we received them, it was late in the following month before they were all available. That means our salesmen were working with

Figure 1



data that was up to 60 days old! Data that old is simply unacceptable in today's environment.

More important, even as we moved to using Goldmine as an agency, our sales data and the rest of our customer contact information were in two different systems. A salesperson would look at sales data to spot a problem and then move over to the contact system to see whom they should contact regarding what they learned from that sales data. We found that dual systems resulted in less information being recorded in the contact management system than we would have liked.

WinRep allows you to see both sales and contact information in the same system. And you can cross-reference almost any piece of information with the customer, contact, line, and even to individual products.

Figure 1 shows the basic customer view from WinRep. Notice how much information is accessible from this view. In addition to traditional contact management in-

formation (e.g. names, addresses, phone/fax/e-mail, follow-ups, appointments, tasks), you can view a customer's sales history.

Contact management software takes one of two approaches. The first is where the primary entity is a contact (a person) and companies are just part of that contact. This is the approach of ACT! The other approach is where the primary entity is a company. That is the approach of the high-end packages like Siebel and Goldmine. WinRep is company-focused. That is, you have a company (customer) who has several contacts associated with it. Our salespeople, when we selected Goldmine several years ago, felt that that approach was more natural in a business-to-business setting.

Another nice feature in WinRep is how you can define a hierarchy of companies. For instance, we sold to distributors. Some of those distributors had multiple branches. And some of those multiple-branch distributors belonged to buying groups.

Figure 2



Figure 3



Figure 4



One of the challenges in our home-brewed sales reporting system was coming up with consolidated sales totals during our annual or semi-annual reviews with customers or buying groups. With WinRep's hierarchy, you simply select the level you want to look at, and you have the data you need for your meeting. You can also select all contacts at all branches at all companies that belong to a buying group. The filters are useful when sending letters or e-mails should a particular manufacturer have a promotion targeted at a specific buying group.

### Customer Sales History

Figure 2 shows sales history for a customer. Note that you can look at overall sales, select a particular factory, change years, or drill down into the data by clicking on one month's bookings or shipments to see how they were comprised (shown in Figure 3).

Figure 4 shows how you can link any piece of information to any number of different data, in this case the customer, a factory, a particular literature request, a project, and even another customer. For instance if two customers compete for certain business, it is handy to link a quote from one to the other so when they call, you are sure to quote them both the same price.

How many hours a year do you spend filing? Or alternatively, how many hours a year do you spend looking for information related to a quote, customer, or manufacturer policy? How many times do you have to tell the customer you'll call them back after you look up the information they need? WinRep lets you file or link any piece of information to sev-

eral areas of its database, and then find that piece of information again starting at the customer screen, manufacturer screen, quote screen, etc.

There has been a lot written on what makes a great salesperson. Certainly one aspect is the ability to create trusting relationships with your customers. But another equally important aspect is your ability to make commitments and follow up on them. Salespeople are constantly juggling many sales and service needs at one time. Unfortunately some salespeople drop more balls than others. One of the key features of a contact management system is its ability to help you organize your commitments and opportunities and follow up on them when promised.

Figure 4 shows a feature where you can delegate tasks to other people in the company. Our inside person could delegate follow up tasks to the appropriate outside person. The task might be to ensure that a problem was resolved, or as in our case, a salesperson in Montana could delegate a literature request to an inside salesperson who had a deeper supply of literature available to ship.

Another WinRep feature can be seen in figure 4. Notice the small drop down menu on the bottom of the task window labeled "Include on Call Report?" This feature is included on tasks and other activities, including quotes. Choosing "yes" allows you to selectively include information to be reported back to your manufacturers.

### **The Importance of Communication**

When I talk with manufacturers about their sales reps, most say

they formally or informally evaluate the level of communication coming from their reps. Many will equate lack of communication with a lack of effort. Most of us are pretty good about calling the manufacturer when there are problems, but when things are going reasonably well, we tend to stop communicating. With a system like WinRep, you can automatically extract what's going on in your territory and send it regularly to your manufacturer.

I've been told that call reports weaken your independent contractor status. My feeling is that required call reports may imply a level of unwanted manufacturer control. On the other hand, voluntary reporting to the manufacturer can position you ahead of your competition.

Using a contact manager, any

**One of the key features of a contact management system is its ability to help you organize your commitments and opportunities....**

contact manager, will make you a more organized salesperson only if you put the time into entering the information required. But that investment in your time will pay off many times over in making you a more effective salesperson. WinRep adds the advantage of being totally integrated with your back office system as well as designed specifically for a multiple line sales representative. □



#### **ABOUT THE AUTHOR:**

*Gregg Marshall, CPMR, is president of Rep Connection Inc., a consulting company that works to help maximize the effectiveness of manufacturers and their professional outsourced field sales forces (reps), especially in the areas of electronic commerce and partner results optimization. He is also a frequent speaker and author.*

*He is a past president of the Association of Independent Manufacturers'/Representatives, Inc. (AIM/R) and has served on the Manufacturers' Representatives Education Research Foundation (MRERF) and Institute for Professional Advancement executive committees. He was chairman of the AIM/R Technology Committee, the AIM/R EDI Task Force, and a member of the American Supply Association Center for Advancing Technology Steering Committee. Currently he is executive director of United Sales Agents, the Association of Gift Industry Professionals. He can be reached by e-mail at gmarshall@repconnection.com, by phone at (303) 475-6634, by fax at (509) 479-5254, or by mail at 1641 S. Lansing St., Aurora, CO 80012.*