



Enhancing sales effectiveness with proven portal solutions.



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Executive summary

As the complexity of sales cycles increases, coordinating a global sales force and channeling its efforts toward a single goal become significantly more challenging. However, by closely aligning individual performance with the company's strategic goals, sales leaders can build a sales team greater than the sum of its parts. Today's more innovative sales organizations are finding that improving the sales team's access to relevant data from other areas of the business—as well as sources outside the enterprise—can shorten the sales cycle and help increase the probability of converting prospects into customers. Also, when sales representatives have the information to understand their roles in a larger strategy, they can perform more effectively and can help improve the customer's experience.

This executive brief discusses the role IBM WebSphere® Portal, IBM® Workplace™ for Business Strategy Execution and IBM Workplace Dashboard for Sales software play in consolidating relevant sales information into an easy-to-use, Web-based portal. With information and capabilities tailored to individual roles, portals can help sales teams respond to competitive pressures, improve customer service and capitalize on emerging opportunities. Portals can also make possible the “single view of the customer” so many organizations strive to achieve by integrating information from customer relationship management and other sales-oriented systems with customer data from throughout the enterprise.

The defining trends in sales

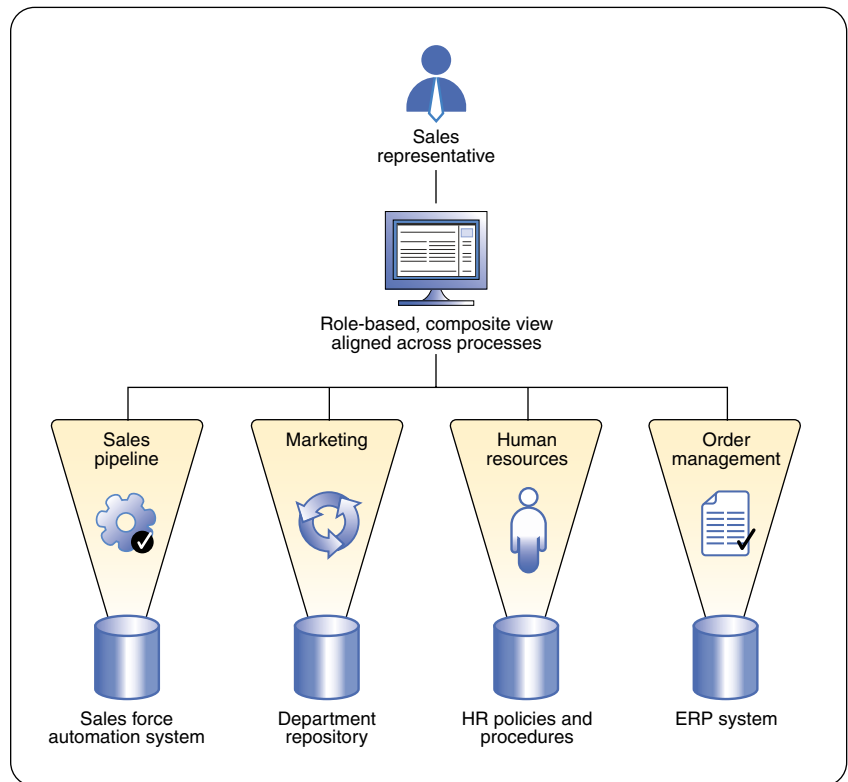
As the front line in today's increasingly competitive worldwide markets, sales professionals are often the first in their organizations to confront the trends shaping their respective industries. For example, the emerging opportunities in global markets have attracted a host of new competitors. To succeed, sales executives must tightly coordinate the efforts of a global sales force and oversee complex engagements with multinational customers. This entails clearly defining the strategy, territories and objectives of the multiple teams pursuing multiple opportunities within a single prospect organization.

Heightened competition and the prevalence of new technology have also accelerated the pace of business. A never-ending stream of new and enhanced products and services requires ongoing education for sales representatives. Meanwhile, as companies move to strengthen their presence in global markets, sales professionals must quickly acquire new skills to address the nuances and requirements of unfamiliar locales. Corporate restructurings and mergers and acquisitions can also make it necessary for sales professionals to adapt to an entirely new culture, sales methodology and product offering.

Sales executives are discovering that continuing to thrive in this environment of flux and unpredictability requires a unified front and close alignment of activities to overall corporate strategy. For a business to maximize its impact on the market, it must present a consistent face to prospects and focus initiatives and effort on agreed-upon goals and objectives. By providing sales professionals with the information they need to understand both the big picture and their specific roles within that picture, sales executives can increase the agility and responsiveness of their organizations and better capitalize on opportunity.

Using portals for more efficient and effective sales

Portal technology has emerged as a highly effective tool for translating strategy into concrete measurable performance objectives for sales professionals. Portals aggregate the information housed in a company’s enterprise resource planning (ERP), human resources (HR), sales force automation (SFA) and customer relationship management (CRM) systems, and package that information in a way that facilitates each unique role within the enterprise. By simplifying access to a focused, browser-based view of information relevant to the sales cycle, portals enable sales professionals to identify the opportunities that align with the larger sales strategy, while providing the capabilities to understand and pursue those opportunities with greater efficiency.



Portals offer sales representatives a comprehensive, role-based view of information critical to the sales cycle, drawing on various sources within and outside the enterprise.

Portal technology can unify the efforts of sales professionals around a single strategy. The portal software packages relevant information from multiple data sources and functional areas from throughout the enterprise, including customer service, product development, brand management and suppliers. This role-specific focus provides individual sales professionals with streamlined access to information suited to their particular responsibilities, clients and specializations.

The sales representative's view

Portals offer sales representatives a convenient real-time source of information on their specific accounts, performance plans and competitors. At any time, a representative can see his or her performance and understand how it maps back to the organization's strategic objectives. The portal can also notify representatives of upcoming training opportunities and changes in customer contact information.

The sales leader's view

Sales leaders can analyze information from multiple management perspectives, including region, representative and product line. They can also drill down within a specific data point to review the component amounts and activities in greater detail. This capability allows them to isolate specific leads within pipeline figures, break down team performance figures to understand an individual representative's contribution and review the specific data items that constitute a forecast. When a team's or representative's performance falls below an acceptable threshold, the portal will alert the manager, enabling a more proactive approach to management issues.

In essence, portals allow sales teams to understand their efforts in the broader context of enterprise strategy. Portals highlight the interdependencies of sales efforts with the other functional areas throughout the business. With the information portals provide, members of the sales team can improve their awareness of marketing campaigns and communications to better prepare for the leads that result from specific promotions. Enhanced visibility into engineering and product development also enables sales representatives to strengthen their understanding of features and benefits and present a more compelling product story to prospects.

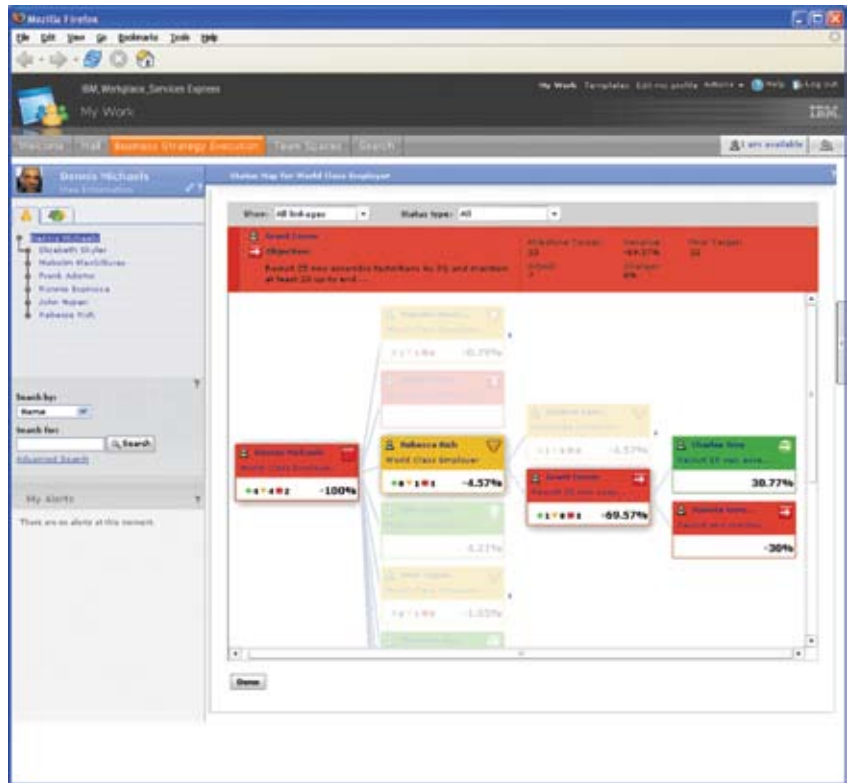
The range of information available from a portal provides an end-to-end view of customer activity. Sales representatives can track every contact with customers, including call center activity, warranty status and purchasing history. When the representative next speaks with the customer, this information can provide valuable insight into up-selling and cross-selling opportunities. This integrated view of all facets of the customer relationship helps the entire business present a coherent, consistent image to the market. It also helps foster greater loyalty with customers by masking the complexity of the business's internal operations. Customers hear consistent messages and see an entire organization thinking and acting as one.

The business value of portals for sales professionals

By focusing sales professionals on precise, role-based information, portals can unite individual activity around a broader sales strategy that maximizes each representative's contributions. This unified approach can pay significant dividends throughout the business.

Improved performance management

Portals equip sales leaders with the tools to significantly improve day-to-day and long-term management of their teams. Managers can closely monitor each representative's activity and ongoing performance based on metrics unique to each team's role in the sales strategy. In turn, representatives can gain a clear understanding of their assignments and responsibilities, and how their performances affect the success of their team and the entire enterprise.



Real-time information on the status of individual objectives enables sales representatives to see how they are performing on specific measures. If the indicators are green, the representative is meeting his or her objectives; if the indicators are red, the representative knows to take corrective action.

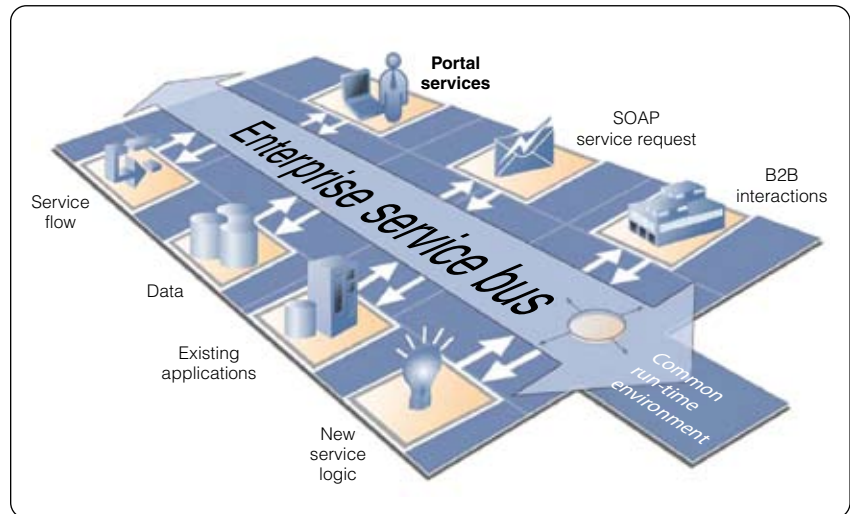
Increased cross-selling and up-selling

Representatives can review order history and identify any affinity for other products, complementary solutions and related services. Vital information on customers also exists in systems that sales professionals typically don't use. A portal provides a "single view of the customer" by including information from other sources that can improve a sales representative's understanding of a customer. Additional information can include request for proposal (RFP) questions, issues logged with call center representatives and installed product and version information. Every sales professional—from telesales representatives to vice presidents of global sales—can see all relevant customer information from all areas of the enterprise, all in one place. When sales representatives have used this broader view of customer information to identify and close new sales opportunities, portals can also provide the ability to process new orders immediately.

IBM Workplace Dashboard for Sales software allows nontechnical sales personnel to personalize elements on their individual portals, without programming or IT assistance. The preconfigured sales dashboard features charts that dynamically adapt as a user adjusts his or her view of presented information. Users can "filter" their views to focus on specific sales opportunities or market conditions, and dashboard elements reformat automatically to reflect the user's specifications. Also, the dashboard issues alerts when data elements reach predefined thresholds, allowing users to address sales-related issues before they negatively affect ongoing business.

Creating the ideal infrastructure for sales portals

Historically, applications for managing the various functions within an enterprise—for example, manufacturing, marketing and customer service—have relied on monolithic, isolated applications with their own architectures and distinct interfaces. The proprietary design of these applications inhibited the sharing of relevant information throughout the enterprise.



A service-oriented architecture supports the more flexible use of applications and promotes smoother integration and sharing of information among an enterprise's various data sources.

With a service-oriented architecture (SOA), the various functions of traditional business applications are broken down into discrete components called services. These services provide a high degree of componentization. They can be grouped and regrouped according to the information need. This more modular approach enables the business to design processes that fit specific business and user needs, not the application's architecture. Portals function as the delivery vehicle for the various services within an SOA. They provide logical groupings of capabilities and data from the underlying applications, based on an individual's role in a specific process and within the enterprise.

One of the advantages SOAs offer sales organizations is that they provide the foundation for scorecard and dashboard technology. IBM Workplace for Business Strategy Execution software features the scorecard and dashboard capabilities that help synchronize effort and resources around a single sales strategy. Performance scorecards establish consistent sales metrics for an entire sales organization. Sales leaders can compare sales performance for a particular region, product line or sales team with the expected performance for each area. Individual sales representatives can also clearly review the metrics on their specific performance. The scorecard packages the information at the level of detail appropriate to the person's role. For example, the sales representative sees a regional sales objective in terms of his or her individual quota for that region.

IBM Workplace Dashboard for Sales software provides a real-time window into information critical to sales activities. Rather than navigating multiple, isolated applications to find the needed information, sales personnel can monitor multiple feeds of highly specific information from the dashboard. Sales leaders can review strategic information such as inventory and production data, as well as competitor and market news. Sales representatives can access a focused view of their pipelines, prospect-related news and account details.

A trusted provider of sales technology solutions

Sales organizations thrive on information. When that information is tailored to each individual's unique responsibilities and helps clarify the priority of each task at any given time, it can dramatically strengthen the link between strategy and execution. IBM Workplace for Business Strategy Execution software enables sales leaders to provide their teams with a clear, coherent picture of strategy, along with the tools that simplify the execution of that strategy. By providing streamlined access to relevant information from every corner of the enterprise, portal solutions for sales organizations from IBM can improve customer service, help identify new sales opportunities and facilitate the collaboration of sales team members by focusing their efforts on shared goals.



For more information

To find out more about IBM WebSphere Portal, IBM Workplace for Business Strategy Execution and IBM Workplace Dashboard for Sales software, please visit:

ibm.com/software/workplace/strategyexecution

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04-06
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