



STRATEGIC PLANNING &
IMPLEMENTATION ASSOCIATES, INC.

Automating Sales Campaigns Why Work Hard When You Can Work Smart?

By
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Ever heard the ol' story that there are many ways to skin-a-cat"? There are. And there are also many ways to stay connected and build relationships and sales revenue with prospects and customers alike. For example:

There's the traditional way – infrequent telephone calls, direct mail, outside sales calls intended to keep the "connection strong".

There's the new way – using sales campaign generators (automatic events) combined with the above – scheduled up to a year in advance and automated so all a BizDev professional has to do is follow the "yellow brick road".

What's the difference? The difference is that the new way keeps you in front and visible to your customer/prospect 6-TIMES MORE OFTEN than even the best organized business development professional might be able to do.

SHOOTING ONESELF IN THE FOOT – THE SNOOZE COMMAND:

The Old Way: Tell you what happens:

- You meet or learn about a prospect you want to sell. You enter the info into your contact management dB. You begin the "campaign" to sell them either by putting them into your schedule: a) to call; b) to email; c) to "drop by"; etc.
- The schedule day arrives. Your contact management program "flags" you to do what it is you told it to tell you (see above).
- Unfortunately, that day, you're TOO BUSY! You have a change in your plans and you can't make that call. So what do you do? Yes, you SNOOZE that reminder for 1-2-3-or-more days in the future to remind you. Right?
- What happens when that day arrives (the snooze date)? There you find yourself with not only the snoozed reminder but also other "snoozed reminders" from other days – plus the events you scheduled for that day.

There's just not enough time – so, guess what? You SNOOZE IT AGAIN (smile). Sound familiar?

A Better Way: Using Salesforce Automation Software

In today's high tech world, there two categories of CRM (customer resource management) software: a) the simple manual system e.g. MS Outlook, ACT and the like; b) CRM systems that allow the user to automate a series of events (campaign elements) based on the number of days in between events using templates and access to information from other sources e.g. your accounting system (QuickBooks for example) to automatically communicate with prospects and customers alike e.g. (Goldmine, SalesLogix, MS CRM, Salesforce.com (ASP), Netsuite.com and the like.

These software systems are designed to take the work out of effectively serving customers and in closing prospects making them into customers.

How does such a salesforce automation (CRM) system work (see illustration attached in PDF format):

According to the DMA (Direct Marketing Association), a company should be in touch with their customer base – and – prospective customer base no less than every 5 weeks – ideally every 3 weeks. They don't distinguish between large accounts and small accounts (B2B). The illustration shows how simple it is to develop a series of AUTOMATIC EVENTS (using CRM software such as Goldmine, SalesLogix, Microsoft CRM, NetSuite, and Salesforce.com). Here the example shows a series of telephone calls (3) that the business development professional makes to a prospective customer. Either he/she:

1. Speaks with them or
2. Doesn't speak with them

If they speak with that prospect, they can easily determine:

- If there is interest in buying/receiving services today
- Or sometime in the future

Then the decision is to determine which of the many "sales campaigns" is appropriate – then "click" on that sales campaign and everything else is done AUTOMATICALLY.

The campaign could be any combination of the following: 1) emails; 2) letters sent by USPO w/wo a collateral e.g. trifold; 3) fax (sent via eFAX or WinFAX); 4) a phone call – where the topic to be discussed is redetermined; 5) to automatically sign that company up to the company's eNewsletter.

Each single event is a template that is customized and sent out to that account/prospect at a predetermined date/time incremented from the date you "click" on the sales campaign and begin the process. An example of how it might work would be as follows:

- A Sales Campaign (hot) B Sales Campaign (less hot)
- 2 days after click – signup f/eNewsletter 2 days after click – signup f/eNewsletter
- 1 week later – letter w/trifold via post 1 week later – email pitch on product/service
- 4 weeks later – call (outline pitch f/meet) 6 weeks later – fax w/industry trend info
- 4 weeks later – email pitch on company 4 weeks later – call (outline pitch f/meeting)
- etc. for up to a full year etc.. for up to 24 months

The Process – How It Makes You 6 Times More Efficient At Staying In Touch w/Clients/Prospects:

If you are a business development professional that attends networking events, your process might look like this:

- Return from event w/many business cards
- Using a business card reader to automatically enter contact information into CRM software, you decide, based on your short meeting, which of the multiple sales campaigns you want to apply to that account.

Then you “click” and everything automatically takes place from there.

- If you make outside sales cold calls, you may wish to do something very similar – the process remains the same.
- If you use the telephone to solicit business, again, depending on what sales campaign you decide to use, the process remains the same.

If prospects and/or customers come to your location, again the process remains the same. Make sense?

Is There Any Downside To The Automated Sales Campaign System?

Yes – because it does require that the company and/or the business development professional needs to create (write) the individual templates, make sure any collateral (trifold, portfolio, etc) is ready and easy to mail, write the telephone call outline scripts, etc. And that takes time?

Then why do it? Because you only have to do it ONCE – not time after time after time.

Then Why Don't More People Do It?

Because business development people, typically, are not writers and often feel uncomfortable being asked to develop their own templates. Business development executives may or may not be great writers. But the templates have to be created for the sales campaign system to work.

My clients frequently call upon my company to do the writing – tweaking it as they deem fit. Or, as an alternative, they elect to hire a copywriter to do the writing for them. This works well if (?) the copywriter is familiar with writing sales letters/faxes/emails/etc. It doesn't work well if they aren't comfortable writing in this arena.

But someone has to do it – whether someone “inside” or an outsourced resource.

What's The Upside To The Automated Sales Campaign System

6-times more visibility with customers and prospects alike. Visibility converts into sales or sales opportunities, as these individuals/companies become familiar/comfortable with a regular communication with your company. People do like to do business with people – not computers or impersonal communications. The “mix” of communications methodology makes the big difference.

Be A Winner:

Electing to use the power of your CRM software will make you a winner. You will see a much higher level of closes, improvement in the average order size and a more positive relationship with customers and prospects alike.

Or you can do it the ol' fashioned way (smile). It is your choice.

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