

a MANA resource for principals and reps

agency sales[®]

MARCH 2021
\$12.97

Willa Moats, Willcare Associates, LLC
Operating Room Nurse to Independent Rep

**The Need to
Educate Principals**

**MAC Meeting Tackles
Covid Response**

**Nine Habits
That Cause Us
Unnecessary Trouble**

**Sales in the Age
of Technology**

Sales in the Age of Technology

How customer relationship management solutions transform sales organizations

BY CHARLIE GERSTMAN

Technology is an integral and mission-critical part of every business process today and a strong technology foundation is essential, no matter the industry. This is especially true in the area of sales. Successful sales executives are constantly looking for ways to sell more, sell better, and sell faster. A key solution to achieve these goals is Customer Relationship Management (CRM).

In this article I will highlight the many benefits and advantages of CRM and how it transformed Harvey Gerstman Associates (HGA), the New York-based manufacturers' representative agency I manage, from a very successful but "not tech savvy" sales organization into an ultra-successful, efficient, "high-tech" sales organization. We achieved this by implementing a CRM solution, collecting and using data to guide the business, and creating new best practices.

Benefits and Considerations

By definition, CRM is software that helps organizations track and communicate with customers and prospects throughout the sales cycle in a consistent and effective manner. CRM systems are designed to monitor these relationships from start to finish, including prospecting, winning the business, maintaining long-term client relationships, and fostering repeat interactions and sales.

Before talking about CRM as it



In reality, the sales process is not always clearly defined — it is both art and science.

relates to my agency, let's discuss the general benefits and considerations of implementing and using CRM solutions.

Benefits:

- Better control of opportunities and organizational data — accounts, contacts, reporting.
- Improved visibility to sales team activities.
- Structured sales process from lead to close.
- More accurate sales forecasting.
- Leverage of contact information for targeted marketing.

• Analysis of where and how the sales team spends its time.

Scalability.

Considerations:

- Customization is expensive.
- Implementation is expensive.
- Management can be time-consuming.
- Lack of buy-in from sales team — “old school vs. new school.”

CRM for Manufacturers' Representatives

For manufacturers' representative agencies specifically, there are three

key areas in which CRM makes the most impact:

- Opportunities and information — Collecting and managing agency principal and account information.
- Management — Managing the sales team in the most efficient and effective way.
- Communication and marketing — Driving contacts, opportunities and sales using the many communication and marketing tools available in CRM solutions.

Within the construction, industrial, retail and safety markets that

At HGA, we have had our fair share of challenges with CRM.

HGA services, CRM solutions are not widely used as compared to other industries like information technology, healthcare, and financial services. In many cases, no customer or contact tracing is used at all. When we speak with manufacturers and other sales colleagues in the industry, we hear the common thread of “old school vs. new school” as it relates to the need for CRM and the success, or lack thereof, of getting their sales teams to adopt the technology in a meaningful way.

In reality, the sales process is not always clearly defined — it is both art and science. So, while it is important to have established procedures and strategies in place, we cannot be so rigid that our sales teams do not have the latitude to be successful in their own ways. This balance is essential and it is important that your organization finds the right mix of technology and process to fit your team.

Unique Challenges

At HGA, we have had our fair share of challenges with CRM. We first moved from an outdated and obsolete sales tracking technology

to a CRM solution that ended up not being the right fit for our agency. Our stumbles can be attributed to both the CRM solution we chose, which was not sophisticated and did not provide updates to keep up with changing times, as well as to our agency not being committed to keeping up with entries. Consistently and regularly entering information into the platform is key to the success of any CRM solution. We did not achieve that success. Until we made a change....

New Beginnings

We then transitioned to Salesforce, the preeminent cloud-based CRM platform used by many of the world’s largest companies. When we had originally considered implementing a CRM solution several years ago, we had evaluated Salesforce. At that time, we felt that it would not fit our business model as manufacturers’ representatives without a significant investment in customization. Having learned from our past experiences and in speaking with colleagues both inside and outside of the industry about Salesforce,

Pardot provides HGA with a highly effective way to leverage our data and reach customers with important information, while allowing our reps to do what they do best — sell!

we decided we would commit to this incredibly robust platform and make the investments needed, both financially and procedurally.

Data-Driven Process

Since then, HGA has not looked back. Salesforce has become the central hub and database for everything we do. For our accounts and manufacturers, we log all activities, track leads and opportunities, share agency successes, store important documents, and so much more. All product catalogs, price lists, flyers and promotions are stored on Salesforce and our sales representatives have continuous access to those materials in the field on a variety of devices. Plus, they have all historic sales data by account and by product line at their fingertips, which enables them to efficiently manage their assigned territories and accounts. In the past, this type of real-time information access was always a major challenge for HGA, as it also was for manufacturers, accounts, and manufacturers' representatives across our industry.

Marketing Success

Additionally, HGA is using Salesforce for marketing and account prospecting. We have invested into Pardot, Salesforce's marketing suite, which enables us to distribute targeted email campaigns on behalf of our manufacturers to key accounts and prospects. Pardot leverages the data from our existing Salesforce database to guide us in developing these campaigns and allows for a high level of customization and personalization. For example, we can send an email out from corporate to a specific account, but the email will appear to come directly from the individual HGA sales representative in the field handling that account. Furthermore,

the account's response to the email is directed back to that sales representative. Pardot provides HGA with a highly effective way to leverage our data and reach customers with important information, while allowing our reps to do what they do best — sell!

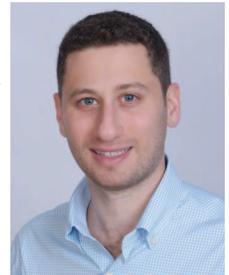
The Results?

Through our implementation and embrace of CRM, HGA has succeeded in two major areas: Our sales have dramatically increased due to the identification of and follow-up

on business opportunities; and we have improved our communication with both our manufacturers and accounts, as well as with our internal sales team, fostering efficiencies we never had before. In short, CRM has transformed our agency and enabled us to drive sales to new heights for our manufacturers using up-to-the-minute data and highly effective marketing tools.

MANA welcomes your comments on this article. Write to us at mana@manaonline.org.

Charlie Gerstman is a principal at MANA-member Harvey Gerstman Associates (HGA), a manufacturers' representative agency that partners with manufacturers in the construction/rental, industrial/MRO, safety and retail markets to sell high quality products into the leading distributor, end-user and retail channels. Email: charlie.gerstman@gerstmanassociates.com. For more information, visit: www.gerstmanassociates.com.



Words of Advice

Are you considering CRM for your sales organization? Here are some tips that will provide guidance throughout the process:

- **Do extensive research.** Find a solution that can be *customized* to your business model.
- **Stay current.** Find a solution that will stay on the cutting edge, receive regular upgrades and improvements, and offer complementary services that leverage your data.
- **Take a long-term approach.** The transition to a CRM solution will not always happen over months — it may take years.
- **Be flexible.** Understand how using a CRM solution will impact each person on your sales team and then set expectations accordingly. Everyone is not at the same skill level when it comes to technology, but if everyone is improving every day, you're on your way to success.
- **Keep learning.** Stay informed about what's out there and how you can leverage your data to take your sales process to the next level.
- **In short** —the transition never ends!