



THE FIELD SALES SOFTWARE BUYER'S GUIDE

EVERYTHING YOU NEED TO KNOW BEFORE EVALUATING AND BUYING FIELD SALES SOFTWARE

2021 EDITION



SOFTWARE BUYER'S GUIDE

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INTRODUCTION

If you've downloaded this guide, it's likely because you are in the process of taking a big leap forward in how you manage your field sales team and enable them to substantially increase their productivity.

Depending on your sales environment, processes and tools, you may have little to no insight into what's happening in the field. How effective or productive is your sales team? Are they visiting the right customers at the right frequency? Which customers have they neglected? This lack of transparency leads to lower performance and trust between you and your team.

The right field sales software should provide you with a toolset that gives you a clear understanding of what is going on out in the field, and it should provide you with easily accessible and accurate data that gives you the ability to go from just “a manager” to an exceptional sales coach and mentor.

The same software or app in the hands of your salespeople should enable them to become more productive and efficient, transforming them from order-takers to trusted and well-informed advisors to your customers by guiding the conversation with the customer to achieve the best outcome for both.

This guide is designed to help you choose the optimal field sales software vendor for your business by ensuring you ask the right questions and focus on the right features and capabilities to meet your specific business requirements.

A man and a woman are standing in a modern office or cafe environment. The man, on the left, is wearing a white t-shirt and white pants, and is looking at a tablet held by the woman. The woman, on the right, is wearing a white blouse and dark pants, and is looking at the tablet. The background features a wall with a grid pattern of small squares, some of which are dark. There are also some yellow pendant lights hanging from the ceiling. The overall scene is brightly lit and has a warm, professional atmosphere.

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"Only 27% of a salesperson's time is actually spent in front of customers selling and building relationships. The right technology can change this."

A 2018 survey of over 200 field sales reps. "The Field Sales Trust Gap Report" by Skynamo.



02 |

**CRM & FIELD
SALES SOFTWARE**

You may already be using a customer relationship management system (CRM) or might be considering one right now. Keep in mind that typical CRM software lacks field sales activity reporting – customers visited, orders submitted, routes driven – and leaves your field sales teams out in the cold when it comes to relieving them of many of their administrative tasks and providing them offline capability and ease-of-use in the field on a mobile device. Most CRM systems are great for desktop users and businesses with longer sales cycles, but not for the product sales and customer engagement requirements of manufacturers, wholesalers and distributors with field sales teams.

Field sales software is designed to help businesses streamline and optimize the entire lifecycle of product sales, optimize face-to-face customer visits, and ensure the right information is being collected in the field during customer visits.

Make sure the software you evaluate for your field sales requirement offers – as a minimum – an on-the-go mobile app for your sales teams with offline capability, as well as features focused on tracking of orders and customer visits, checking on stock-levels in real-time, and submission of orders for approval or fulfillment from the field. Field sales software is designed to improve order accuracy, visibility of field sales activity and effectiveness, and lower the cost of field sales by optimizing reps' routes, customer visits and daily tasks. That's when you'll begin to see a real return on your software investment.

A woman with curly hair is sitting at a desk, smiling while looking at a laptop. The background is a blurred office environment with windows and green wall decorations.

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"Sales people spend about 17% of their time on admin. That's almost a full workday per week. Make sure the technology you choose reduces admin by automating menial and repetitive tasks."

A 2018 survey of over 200 field sales reps. "The Field Sales Trust Gap Report" by Skynamo.

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8 BIG THINGS TO DO BEFORE BEGINNING YOUR SEARCH

QUESTIONS AND CONSIDERATIONS

Before you begin your search for the ideal software vendor, it is important to reflect on the current challenges and pain points you are experiencing.

By conducting the due diligence upfront, you are automatically able to identify what functions you need the software to perform. This helps you, as the buyer, to remain focused on what it is you need to accomplish and not get distracted by features which are nice to have, but not necessarily relevant to your business and sales process.



01 LIST YOUR GOALS

Start off by creating a list of goals you want to achieve. You might be experiencing declining sales, customer churn, or lost productivity, and you want to change that.

Below is a list of some common goals that can help you improve sales, reduce customer churn and increase productivity:

- Improve visibility into the day-to-day activities of your field sales team
- Improve level of detail and accuracy of call reports
- Increase the frequency customers are being visited
- Improved visibility into the day-to-day activities of your field sales team
- Implement standard method of easily collecting information in the field during customer visits and compile it in way that enables the generation of insightful reports

- Ensure your field sales team follows your sales process and workflow
- Reduce time sales reps spend writing up call reports
- Reduce time spent waiting on call reports and going through them
- Reduce time spent re-capturing orders from paper into back-office systems, which also reduces human error during data entry
- Improve level of detail and accuracy of call reports
- Increase the frequency at which customers are being visited
- Improve order accuracy and reduce delays in order fulfilment
- Reduce number of product returns due to inaccurate orders
- Improve view of competitor penetration into your customer base
- Gain insight into who your most profitable customers are and where your reps should be spending more time
- Improve the accuracy of data that sales teams access and submit in the field

Use the above list to check off any that apply to you and expand on it.

Also, try to quantify your goals so you know whether you've achieved them and you can better manage and communicate your expectations: Are you wanting to increase average number of daily customer visits by 50%? Are you wanting to increase sales by 20%? Have those goals on hand and share them with the vendors you are evaluating.



02 OUTLINE YOUR IDEAL SALES PROCESS

Outline the ideal sales process that you would like the software solution to support, and identify areas for improvement. Software helps to accelerate business processes by automating menial and repetitive tasks, thus reducing human error. If implemented correctly, the software you choose should enable you to customise your workflow in order to ensure the most efficient process is being followed and all necessary tasks are being completed.

It is, however, important to note that implementing sales software cannot be considered a “silver bullet”. It is therefore imperative that you are constantly improving every stage of your sales process which will enable you to get the most out of the software you decide to purchase.



03 CREATE YOUR LIST OF SALES REPORTS REQUIRED

For you to make smart sales decisions you need answers to specific questions. A good field sales solution should incorporate a strong business intelligence or sales analytics component, so create your list of questions that you need answers to on a daily, weekly and monthly or quarterly basis to ensure you are making smart sales decisions.

Have this list handy when speaking to a software vendor and have them tell you or show you how their solution will answer these questions for you. And if they do, is it an out-of-the-box report or will it require them to create this report for you? And how much will it cost?

Below is a list of sample questions field sales operations typically need answers to:

- Who are my most profitable customers?
- Who are my top sales performers? By activity? By close rate? By sales revenue?
- What is the average time my reps are spending with customers at each visit?
- Which customers are buying less over time? Which are buying more?
- Who are my top 10 customers by sales revenue? This month? This quarter or year?
- Are my sales reps going to reach their targeted number of customer visits this month?
- What are my top selling products? Per region? Per customer? Per customer group?
- Are customers being visited frequently enough? How many are unscheduled visits?
- How much of a particular product have I sold this month compared to last month?
Compared to last year?
- Which customers were visited today? By a particular sales rep?
- Are reps missing customer visits?
- Which customers are overdue a visit?
- Do more visits to a particular customer result in more sales?

Make sure the vendors you choose can provide you with the insights you need to make smart sales decisions.



04 LIST YOUR REQUIREMENTS

Once your ideal sales process is mapped out and clear, list the requirements the chosen software must support. For ideas of what to include in your list, see this guide's sections "Top 10 features and functionality to look for" and "Questions smart buyers ask".

Mark the requirements that are "must haves" and "nice to haves". A "must have" feature or service offering is one that will lead you to opt for another vendor regardless of price. In other words, you are left asking yourself, "What's the point of investing in this solution if it can't do XYZ?". A "nice to have" feature or service offering is one that would be great to have, but is not critical to the success of your ideal business process.

This list will be very helpful when evaluating different feature and service offerings side-by-side to ensure you are choosing the vendor that will meet your technology requirements and support your critical business processes.



05 LIST ALL PEOPLE & SOFTWARE INVOLVED IN YOUR SALES

In order for you to get an accurate understanding of what your total cost will be of using field sales software, you need to know how many licenses you will need.

How many people are involved in maintaining your customer relationships, fulfilling orders and managing and supporting your team? How many people would the software potentially need to support? What other software do you use in the sales process that would potentially need to be in sync with or draw information from your field sales software?

These two questions will need clear answers to determine your final set-up and monthly or annual costs.



06 CONSIDER YOUR BUDGET & EXPECTED ROI

In order to manage your own expectations, make sure you ask yourself the following:

- What are you able to and willing to pay per month or per year to achieve your goals, overcome your challenges and alleviate pain points?
- What are you expecting the return on your investment to be?
- What are the key results you need to achieve to feel that you are getting your money's worth?



07 CONSULT WITH YOUR IT DEPARTMENT

Speak to your IT department to ensure you are choosing a solution that fits in with the current tech stack or ecosystem they are supporting and have envisioned for your business. Involve them in the evaluation to not only keep their goals and requirements in mind, but also for support around technical queries during the evaluation.



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DECIDE HOW IMPORTANT DATA SECURITY IS TO YOU

Nowadays most software runs in the cloud which means the software is hosted by the service provider and not on your server or computer. Your data is also hosted or stored by the service provider, so make sure that they have taken the proper precautions to protect your data and your customers' data. A data breach can increase the risk of litigation for you by your customers, damage your reputation and impact your revenue should your customers' data fall into the wrong hands. Ensure software vendors have done all they can to protect your customers' data by confirming that they are ISO 27001:2013 certified.

ISO 27001:2013 certification confirms that the company has the systems, policies and procedures in place to ensure customer, product and company information are secure. It is the internationally recognized standard for global best practice in information security management, agreed upon and set by members from 164 countries and 783 technical committees and subcommittees.



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“We doubled our monthly customer visits and saw an increase in monthly sales simply because we’re visiting our customers more regularly.”

“The impact on our business has been a 17% increase in sales volume from our existing base last year and an expected growth in revenue of about 15% this year.”

A Shell Lubricants distributor after implementing the right field sales technology for their business.

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TOP 10 FEATURES TO LOOK FOR

Depending on your business and sales process, there are a multitude of features and functionality that your ideal solution should offer. However, we've listed the top 10 features that are critical in achieving high adoption of the solution by your team, excellent service levels to your customers and a dramatic reduction in human error and time spent on admin.



01 MOBILE FIRST APPLICATION

Most sales enablement software is designed for desktop use first and then mobile use on rare occasions. That was fine perhaps 10 to 15 years ago, but with the advent of the smartphone and tablets, more and more field sales teams are accessing their sales enablement software via a mobile device. It's important to make sure that the field sales software you choose has been designed primarily for use on a mobile device to ensure that your team has a superior end-user experience.

By providing your field users with a better end-user experience, you will benefit from higher volumes of quality and accurate data being captured in the field and higher adoption rates of the new software. It is also important to note that the software needs to be compatible with the mobile devices your team use and that the devices meet their minimum specification requirements. Using devices that do not meet a software vendor's minimum specification requirements can result in slower performance or lagging, which will result in resistance in adoption by your sales team.



02 CERTIFIED INTEGRATION WITH YOUR ERP OR ACCOUNTING PACKAGE

One of the main benefits of a field sales software should be providing your field sales team with accurate pricing, product, stock level and customer information in the field. This is best achieved by integrating your accounting package or ERP software. This reduces product returns, credit notes and delays in order fulfilment.

Ask the vendor if they are familiar with your specific accounting package or ERP software and if they have done an integration of their software with it before. If they haven't done an integration before with it, ask them how long it will take and how much it will cost.

There is a risk of choosing a software vendor with an unproven integration capability with your ERP or accounting software — the last thing you want to struggle with is an integration that only works half the time.

Choosing a vendor with an integration certified by your ERP or accounting software package or existing integrations successfully supporting other customers is ideal. However, if they have a dedicated team of integration specialists who have proven to successfully integrate with other leading ERP and accounting software packages, your risk should be minimal.



03 CUSTOMIZABLE FORMS

Are you tired of getting cryptic customer visit notes, such as “All fine.”? Apart from selling and maintaining good relationships, your reps should be gathering valuable information in the field.

You need a library of predesigned templated forms, plus the ability for you to build an unlimited cluster of your own forms – such as health and safety requirements, contracts and signing, and industry insights.

Customizable forms are important, because they enable reps to easily capture information in a standard and consistent format during a customer visit, so data collected in the field can be aggregated into informative reports and dashboards. And advanced customization capability should enable you to specify when specific forms are to be used, e.g. by region, by customer segment, by industry, by customer.



04 OFFLINE CAPABILITIES

Whether your reps are working in remote areas with poor internet access, catching up on work during a flight or train commute, or visiting a customer in an area with no internet access due to security or location, lack of internet access should not prevent your reps from accessing information and functionality in the field sales software.

Ensure the field sales software or component for field sales reps is a mobile-first app that runs on their mobile device and not a desktop application that requires internet access for them to use its functionality.

Other benefits of offline capability:

- **Less frustration and higher adoption:** Offline apps require very little loading time, meaning information is instantly available – no waiting on information to download. So, the app is responsive, which means sales reps will love it and use it.
- **Constant navigation on the road:** Saved map and GPS functions work offline, so planned routes remain available to reps.
- **Longer battery life:** Offline apps are less likely to drain your battery. Data is synced in batches when network connection becomes available instead of continual, battery intensive connection attempts in offline areas. Turned on screens are the most power-hungry element of mobile devices. Screen time is increased while waiting for data uploads and downloads when bad or no connection is experienced.



05 VOICE-TO-TEXT FOR NOTETAKING & DATA CAPTURING

Your sales team is often rushing between one customer visit and another. They have little time between meetings to sit and type up call or visit notes and complete forms and reports, so information is often incomplete and cryptic.

Ensure the software they use offers the option of voice-to-text to increase the volume and quality of information being captured in the field during customer visits.



06 CALL CYCLES & VISIT FREQUENCY

You may need to visit your customers periodically — on the same day each time — to ensure they have enough stock. Or you might need flexibility in scenarios where you don't have to see all your customers on specific day. You may require a call cycle being set for some customers and a visit frequency for others, e.g. roughly once every two weeks.

Make sure you have options for setting both visit frequencies and call cycles.



07 ORDER TO PAYMENT

Capturing orders offline – for example on paper forms or via instant message or telephone – creates the likelihood of data entry error and causes delays in order fulfilment as they then need to be manually re-captured into your back-office system.

Built-in order capturing functionality ensures orders can either be submitted directly into your back-office system for approval or fulfilment, or via batch-imports at the end of each day

From order placing through delivery to payment, field sales software should be able to manage every interaction with customers right from when they place an order or inquire about channel products, to delivery and payment.



08 INVENTORY MANAGEMENT

Another very important feature of sales software is the ability to manage and update inventory as products are being sold. This will help sales representatives to reduce shortage costs, time and out-of-stock administration.



09 GPS TRACKING (AND NO-TRACKING MODE)

Field sales software relies on GPS tracking to automate tasks such as logging distance travelled, customers visited, and time spent at a customer. GPS tracking also enables managers to track the live location and daily activities of their sales reps.

However, many sales managers and team leaders are also careful not to invade their team members' privacy by tracking and micromanaging them. They want their teams to feel more in control of their own day without the feeling of being monitored.

Field sales software should have the option to turn off tracking of users while still providing the many time-saving features GPS tracking provides.



10 COVID-19 SAFETY FEATURES

Times have changed and field sales needs to adapt to new health and safety requirements. In-person customer visits can put reps or your customers at risk of infection with the COVID-19 virus.

Built-in COVID-19 safety protocols and features that support contact tracking and tracing and cultivate a culture of compliance minimize the risk of infection and will put minds at ease so both reps and customers feel comfortable with in-person visits.

A man with a beard, wearing a light blue button-down shirt, is looking down at a tablet computer he is holding. He is standing in a warehouse or industrial setting, with metal shelving and equipment visible in the background. The image has a blue tint and a semi-transparent overlay.

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"68% of sales people admit to having closed a deal without being certain whether their company can fulfil the order. Make sure the technology you choose provides a real-time view of stock levels and product availability."

A 2018 survey of over 200 field sales reps. "The Field Sales Trust Gap Report" by Skynamo.

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QUESTIONS SMART BUYERS ASK

As a first-time buyer, you don't know what you don't know. So, the list of questions below to ask a software vendor should highlight things you need to bear in mind and know the answers to before deciding on which vendor provides you with the most cost-effective solution to meet your specific requirements.



GETTING STARTED & SET-UP

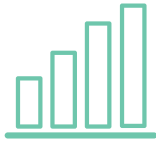
- What is the set-up cost and how long does it typically take?
- What is typically required from you to ensure a successful set-up?

Answers to these questions will manage your expectations in terms of time and effort required from your business in the set-up and how soon you can begin benefiting from the new software.



TOTAL COST OF OWNERSHIP

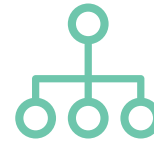
- What is the total monthly or annual cost of running the software?
- What is not included in the monthly or annual subscription that they may charge you as an additional fee? For example, are there additional data storage costs? Or charges per transaction or order captured? Or charges for running and maintaining the integration between the software and your accounting package or ERP software?
- How much data does a mobile user typically use in one month on the field sales software or app? This is often a hidden cost that you need to be aware of to get an accurate view of the monthly costs you will incur for using the product.
- What devices does the software or app run on and what are their minimum specifications to ensure an optimal end-user experience? Ask your vendor which platforms their software or app runs on so you make sure it runs on the same platform your users are on. If not, you may need to invest in new mobile devices for your team before you can make use of the software.



SALES ANALYTICS AND REPORTING

- How will they support your data insights and reports you need?
- Do they have a dedicated team of data analytics specialists?
- What are the typical costs for creation of customized reports?

This is important, because your business is unique and you have specific questions you need answered by customized reports on top of their out-of-the-box reports.



INTEGRATION WITH YOUR OTHER SYSTEMS

- Do they have a dedicated team of ERP or accounting software package integration specialists who can ensure that integration with your back-office systems (if required) runs seamlessly as expected?
- Have they done an integration with your ERP or accounting package software? If so, are they certified and endorsed by your ERP or accounting package software vendor?



SECURITY OF YOUR LONG-TERM STRATEGIC INVESTMENT

- How many developers do they have working on the product? Are they reliant on only two or three developers who might leave the business and put your long-term investment in the software at risk? A larger development team ensures that product knowledge rests not only with one or two key developers and that product will continue to evolve with new features as your requirements grow.
- What features have they committed to rolling out in the next year? Ask them to share their product roadmap with you. This is a list and schedule of new features planned for the product. Are these upcoming features relevant to your business? If any of them are ones you require now, how soon will they be available? Will the product be able to support your business in the long term as your requirements grow?



AFTER-SALES EXPERIENCE (TRAINING, ACCOUNT MANAGEMENT AND SUPPORT)

- What happens once you are all set up and running?
- Is there an account manager or customer success team dedicated to your business and ensuring the product is meeting your objectives? Are there regularly scheduled check-ins?
- Do they have a dedicated training team? If so, what is the cost of training your team? Once your team is trained, how would additional users added to your team later be trained? Although ease-of-use should minimize the need for extensive training, the more advanced products are full of great features that require training to ensure you get the most out of these innovative features. Software vendors should provide online training to provide your end-users with the flexibility to get training on-demand or scheduled live training, as well as access to refresher training in short video snippets focused on specific functionality. A dedicated training team means new training content is always being produced as new features are rolled out and live or dedicated training can be scheduled for your business.
- Do they have a dedicated support team? How much does support cost? Even with great training and a great product, quick and easy access to support is vital in ensuring your team is able to remain productive when they experience any technical issues.



SECURITY OF YOUR SENSITIVE DATA

- What data is collected by the software? Field sales software typically collects and stores highly sensitive information such as customer information, product price lists and employees' personal details, in order to provide an effective service.
- How do they ensure maximum protection of your sensitive data? Do they have ISO 27001 security? Ensure software vendors have done all they can to protect your customers' data by confirming that they are ISO 27001:2013 certified. ISO 27001:2013 certification confirms that the company has the systems, policies and procedures in place to ensure customer, product and company information is secure. It is the internationally recognized standard for global best practice in information security management, agreed upon and set by members from 164 countries and 783 technical committees and subcommittees.

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"We now coach up instead of coaching out. Sales reps who were previously identified as star performers are performing even better with the new field sales platform, while poor performers now receive coaching. The technology allows managers to identify why some reps struggle to sell and puts them in a position to coach their reps to perform better."

A manufacturer of engineering products after implementing the right field sales technology for their business.





CONCLUSION

The lists, hints and tips in this guide are by no means exhaustive. There are many more questions and requirements to keep in mind depending on your particular business and industry. We welcome your feedback on information you feel we should include, so we can review and consider it for inclusion in future editions of this guide.

This guide has been compiled and published by Skynamo, developers of industry-leading field sales technology.



ABOUT SKYNAMO

Skynamo is the leading field sales management software used by manufacturers, wholesalers and distributors.

Field sales managers and business owners use Skynamo's cloud-based platform to gain real-time insight into field sales activity and effectiveness, enabling smarter sales decisions and coaching of their field sales teams remotely.

Field sales reps use Skynamo's mobile app to increase productivity, eliminate admin, track customer engagements and access accurate information, such as stock levels, pricing, product availability, historical sales, and customer information. Skynamo integrates with back-office systems (e.g. ERP and CRM systems) to improve order accuracy and order fulfilment turnaround times.

Skynamo customers typically experience an increase in sales of up to 20% their first year and a doubling of customer visits thanks to increased efficiency and productivity and smarter sales decisions.

For more information and a free demo, visit www.skynamo.com