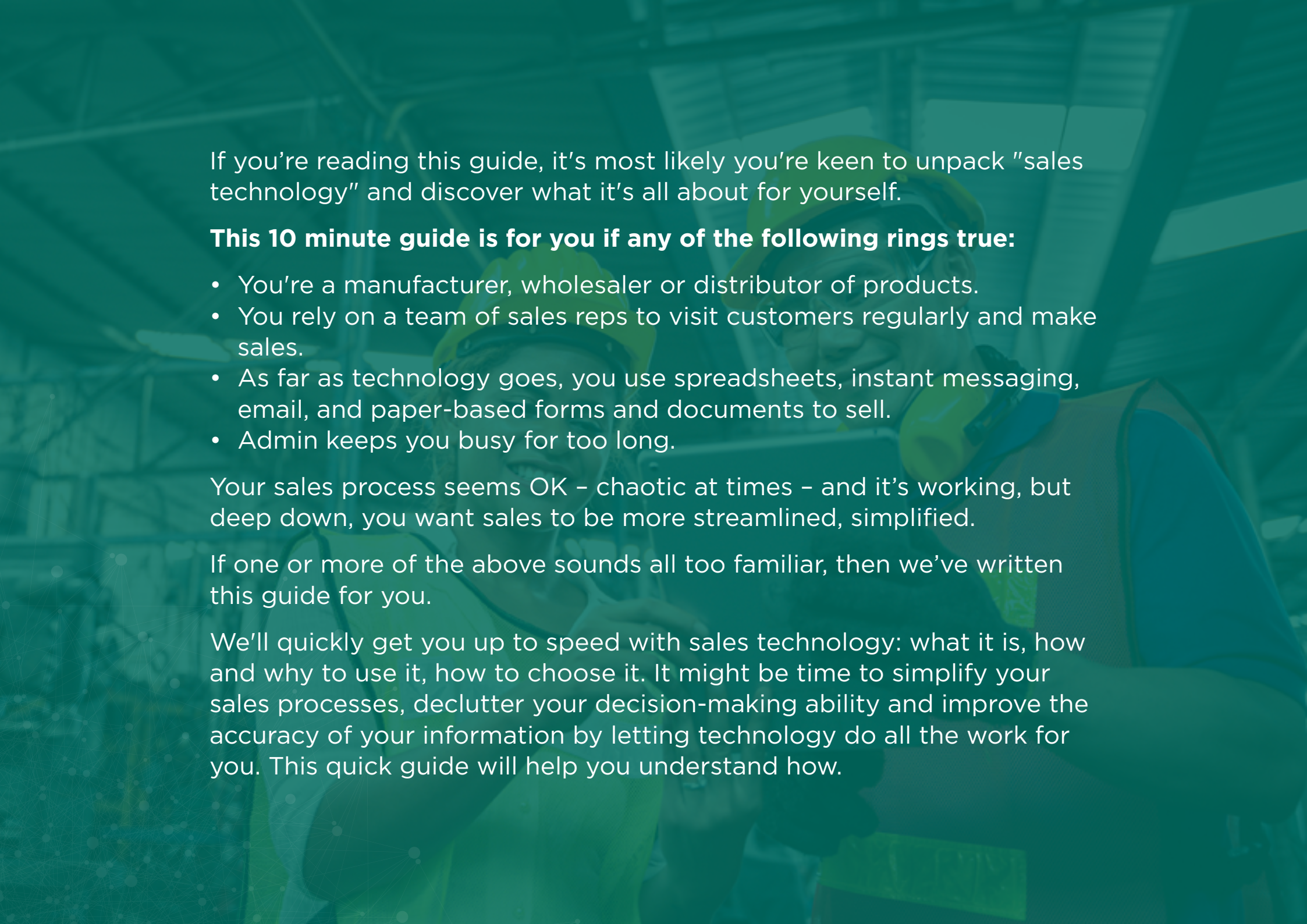




— A QUICK BEGINNER'S GUIDE —

UNDERSTANDING SALES TECHNOLOGY

A background image showing two construction workers wearing yellow hard hats and high-visibility safety vests. They are looking at a tablet computer together. The image is overlaid with a semi-transparent teal color.

If you're reading this guide, it's most likely you're keen to unpack "sales technology" and discover what it's all about for yourself.

This 10 minute guide is for you if any of the following rings true:

- You're a manufacturer, wholesaler or distributor of products.
- You rely on a team of sales reps to visit customers regularly and make sales.
- As far as technology goes, you use spreadsheets, instant messaging, email, and paper-based forms and documents to sell.
- Admin keeps you busy for too long.

Your sales process seems OK – chaotic at times – and it's working, but deep down, you want sales to be more streamlined, simplified.

If one or more of the above sounds all too familiar, then we've written this guide for you.

We'll quickly get you up to speed with sales technology: what it is, how and why to use it, how to choose it. It might be time to simplify your sales processes, declutter your decision-making ability and improve the accuracy of your information by letting technology do all the work for you. This quick guide will help you understand how.

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WHAT ARE THE DIFFERENT TYPES OF SALES TECHNOLOGIES

Before we continue, let's clarify some confusing terminology.

- Customer Relationship Management
- Marketing Automation
- Sales Intelligence solutions
- Sales Force Automation
- Field Sales Automation
- The difference between Sales Force Automation and CRM

01



CUSTOMER

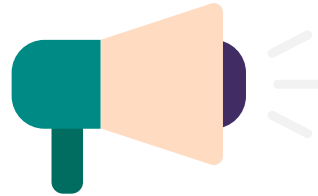
RELATIONSHIP MANAGEMENT

Keep track of all of your customer engagements, build stronger relationships.

Customer relationship management (CRM) is a process that businesses use to manage, track, and even automate their interactions with customers.

CRM systems store all customer information centrally for you and your team to access and benefit from a single view of all customer contact information, interactions, and sales.

The goal of CRM is to strengthen your relationship with your customers by ensuring you have accurate information about your customers and how you've engaged with them.



MARKETING AUTOMATION

Communicate and market in a consistent matter, automate marketing tasks and report on marketing effectiveness.

Marketing automation refers to technologies that automate, track and report on communication and engagements with prospects and customers, such as mass emails, social media posts and visits to your website. It also tracks the effectiveness of these engagements in generating leads, converting them into customers and retaining them.



SALES INTELLIGENCE SOLUTIONS

Proactively identify and deliver up-sell and cross-sell opportunities.

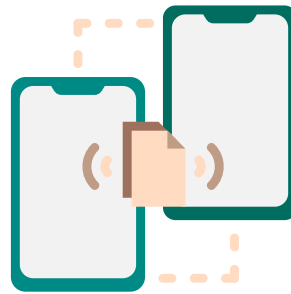
Sales intelligence software improves both the quality and quantity of sales leads by using data to help salespeople find new opportunities. Basically, these technologies collect, analyze and present data in such a way that salespeople can have improved insight into prospective and existing customers' needs. Sales intelligence solutions are specifically designed for salespeople and sales managers to proactively identify and deliver up-sell and cross-sell opportunities.



SALES FORCE AUTOMATION

Manage your sales team, your sales process and pipeline efficiently and report back on sales effectiveness and progress accurately.

Sales force automation automatically records and reports on all the stages in a sales process. It ensures certain steps are followed and information is logged during the sales process to enable accurate reporting on sales effectiveness and sales forecasting.



FIELD

SALES AUTOMATION

Gain visibility of field sales activity, capture product orders in the field, boost your sales rep productivity and effectiveness on the road, improve and increase customer visits.

Field Sales Software is a sub-set of Sales Force Automation – a segment specifically focusing on automating product sales for reps in the field and managing a remote sales team. Field Sales software uses GPS technology to automate many of the mundane tasks for field sales reps such as logging drive time and customer visits, as well as provide important field sales effectiveness data for managers. Integration with inventory management systems and accounting packages can not only provide reps with accurate product information such as availability, descriptions and applicable discounts, but also allow them to submit orders from the field during a customer visit.



— THE DIFFERENCE BETWEEN —

SALES FORCE AUTOMATION & CRM

Many people wonder about the difference between sales force automation (SFA) and customer relationship management (CRM).

To add to the confusion, sales force automation is often classified as a sub-set of CRM since it focuses mainly on the sales cycle of the customer relationship while CRM covers the entire customer life cycle.

Due to the focus on tracking customer engagements and customer retention, CRMs are often used across the business - including sales, marketing, and support - to track and improve interactions across all touchpoints of a business.



Sales force automation on the other hand is focused on Sales. It automates and helps manage the sales process to new and existing customers, while CRM focuses on creating a single view of all customer engagements across the business (Sales, Marketing and Support) with the intention of increasing retention of these customers.

[Click here](#) to read a more detailed description of the differences between CRM and Sales Force Automation tools.



SALES MANAGER PERMOSEAL

”

"Our reps can now see their accounts in real-time, so admin efforts are spent where they count. At least 3-4 hours that used to be spent on admin can now be applied elsewhere."

Permoseal is a leading manufacturer and supplier of adhesives, sealants and DIY products in the consumer, construction, and industrial markets. Permoseal reps used to do all of their writing on paper which then had to be transcribed to Excel spreadsheets at the end of the day. Before placing an order, reps had to phone the sales admin staff to check stock levels, and if errors or missing information were picked up by the admin staff, reps had to redo orders. Moving to the right sales technology has allowed their reps to spend less time on unnecessary admin, given them the ability to edit any order details at the click of a button and ensure accurate and timely information at their fingertips.

HOW THE RIGHT SALES TECH CAN BENEFIT YOU

02



Technology can make your business more responsive, faster and more effective by automating and streamlining your processes and freeing you to focus on the right things.

Remember that earlier stat where more than a third (38%) of sales reps we surveyed believe technology is “more of a hindrance than a help”? For salespeople on the road it’s really no wonder that they find technology a hinderance. In so many cases the wrong tools are implemented.

Massive advances in technology provide us with all the components needed to make it easier for salespeople to gather and have access to high quality data – but this isn’t happening – because experience has taught reps and their manager that tech just makes it more difficult, not easier. But this isn’t true. The right technology can make all the difference. For example, field sales reps need a mobile app designed specifically for use on a mobile device and that supports the unique set of tasks they perform while on the road.



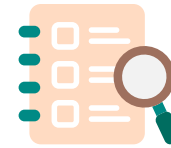
Imagine the possibilities with the right sales technology. Instead of wading through paperwork, emails and Excel spreadsheets you and your sales reps could be:



Seeing more customers



Making more sales.



Viewing accurate sales reports



Growing the business



In a happier, more productive work environment



Leaving work on time



Spending more time with family and friends.



The right sales technology can help you achieve all of the above! You'll no longer waste time searching through spreadsheets and notes to find the answers you need and be left wondering if it's correct or the latest information. You and your reps will have instant access to all the information you need by capturing and storing all your sales data and activity information in one centralized and secure place. And with accurate reporting from sales reps and sales activity, you and your reps will be able to make smarter sales decisions that lead to more sales and stronger customer relationships.

Plus, you'll make a better impression on customers – because you'll have all the answers and documentation at hand when you and they need it.

The background image shows two men in a warehouse setting, wearing face masks and aprons, looking at a tablet together. The scene is overlaid with a semi-transparent purple filter. On the left, there are stacks of metal kegs. The men are in the center, and the right side shows more of the warehouse structure.

SALES MANAGER INTERSTAT

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"Before entering a customer's store, I view the visit history on my Field Sales app to refresh my memory on what we discussed the last time I visited."

Interstat is a seller of all stationery related products to a combination of commercial and retail customers, who found order-taking a slow and problematic process. Orders used to be taken on sales order pads and processed at the end of the working day but going digital with the right sales technology has increased their productivity by reducing daily admin, freeing up reps to spend more quality time with customers and prospects.

**WHAT HAPPENS IF YOU
DON'T MAKE THE CHANGE?**

03



Are you thinking “My processes could be better, sure there are some issues, but I can get by for now”? Are your competitors thinking the same? Or are they adopting technology to streamline their communication and improve the accuracy and volume of the data they have to make decisions? Are they making a better impression in the market and impressing customers and prospects with their speed and professionalism?

In today’s rapid and ongoing automation of traditional manufacturing and industrial practices, you could be left behind, as well as behind your competition. Which puts your customer relationships at risk.

Healthy relationships are crucial to sales success – but many business leaders just aren’t sure about the role that technology can play in growing business relationships.

This is understandable when you consider that a lot of the technology we’ve developed to connect people across the digital landscape has actually isolated us even more.

Missing this opportunity to go digital could allow your competition the edge they need to get ahead. You could very easily find yourself losing customers, sales and revenue to your new and improved competitors who are using time-saving sales technology. While they digitize their sales process, streamline their sales and improve their face-to-face interactions with customers, you could be left struggling to keep up and ultimately be paying even more for slower, error-prone sales processes.



SALES MANAGER TRIANGLE LUBRICANTS

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"Less checking-up-on and more coaching, along with the updated information provided by our Field Sales software, results in technically strong reps who add value to customers. "

Triangle Lubricants is a Shell lubricant distributor that struggled to make delivery promises due to delays between actual order placement and those orders being entered into their system. Going digital with the right sales technology has allowed Triangle to close this time gap and gives them access to real time data from the field and the back office.

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WHY IT'S A GOOD TIME FOR YOU AND YOUR SALES REPS TO GO DIGITAL

04



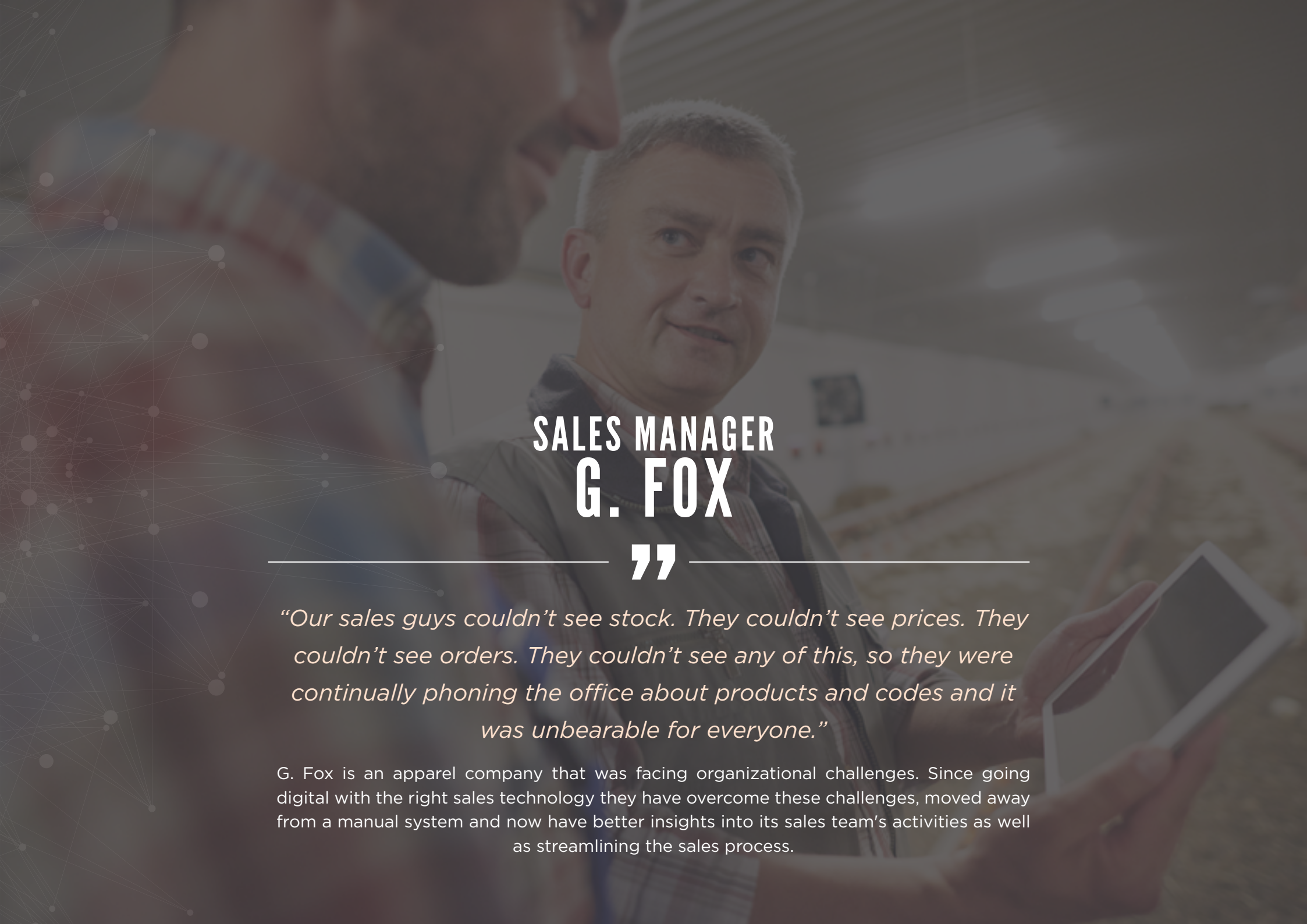
The fact is you're already using digital technology and benefiting from it daily on your mobile device.

There is no lack of willingness to adopt a new mobile app to help you schedule your day, find your way around a city, communicate and keep up with friend and family or, very importantly, draw up a budget and stick to it.

Except in the sales industry, where more than a third (38%) of field sales reps we surveyed believe technology is “more of a hindrance than a help”. But why should this be the case when field sales apps provide similar benefits to other apps that help people schedule their days, effectively navigate their way around unknown areas and significantly reduce their workloads?

Our survey revealed that businesses are placing a high reliance on “low-tech” such as Excel spreadsheets (48%) and email and instant messaging (41%) for day-to-day updates. These businesses also expect their employees to manage data by using disjointed mixes of tools that aren't designed for use in the field. As a result, “technology” has become synonymous with “tools that interfere with selling”.

However, not only can you expect going digital to save you time but increase the volume and accuracy of the data you capture, as well. Technology helps you do things faster, more efficiently and more accurately and effectively. Why wouldn't you want that for your sales processes?



SALES MANAGER G. FOX

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“Our sales guys couldn’t see stock. They couldn’t see prices. They couldn’t see orders. They couldn’t see any of this, so they were continually phoning the office about products and codes and it was unbearable for everyone.”

G. Fox is an apparel company that was facing organizational challenges. Since going digital with the right sales technology they have overcome these challenges, moved away from a manual system and now have better insights into its sales team’s activities as well as streamlining the sales process.



CHOOSING THE RIGHT SOFTWARE FOR PRODUCT SALES

Choosing the wrong software can be incredibly frustrating and end up slowing you down if it's cumbersome, complex, difficult to use and not fit-for-purpose. If you've decided to buy, then here are eight key features we believe makes for the 'right' sales software for B2B / business to business product sales:

05



01 DATA ANALYTICS

Data is fast becoming a fundamental part of every business process. You rely on accurate and comprehensive data to make smart decisions. Make sure your software solution includes advanced data analytics features that enable easy capturing of all relevant data during the sales process.



02 SALES ACTIVITY REPORTING

It's important to have sales activity reporting that tracks customer engagements and product sales so you can make sure reps are putting in the right amount of effort with each customer to maximize profitability and effectiveness of their engagements. Also, a centralized view of all engagements with a customer make it easy for other reps to take over an account and carry on where the other rep left off if a rep is sick, on leave or leaves the business.



03 ORDER & INVOICE PROCESSING

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



04 INVENTORY MANAGEMENT

The ability to view inventory as products are being sold is a very important feature of sales software – this can often be achieved through integration with existing inventory management or accounting packages. This will help sales representatives to reduce shortage costs, time and out-of-stock administration.



05 INTEGRATION WITH OTHER SOFTWARE



Speaking of integration, the true power of sales software really comes alive when integrated with your other business software like inventory management and accounting software. This harmonious connection does away with duplicate data entry and errors caused by manual processes, which are time-consuming to use – and to correct.

07 EASE OF USE



Sales software needs to be easy to use – otherwise it won't get used. It's about easily accessing data, at the right place and time, for the sales conversation to be strong and confident.

06 CUSTOMIZED FORM MANAGEMENT



You need sales software with the flexibility of a library of pre-designed, 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, competitor insights, and customer visit information – to enable you to capture and report on information you need to make savvy sales decisions and to coach your team.

08 MOBILE FIRST



If you have a team of reps visiting customers regularly to replenish stock, make new sales or collect information, you need to ensure they have access to all the information they need at all times via a mobile device. It also needs to be built for mobile users, so it's easy for them to capture orders and information and access accurate information – even if they have no internet access.

A man and a woman are looking at a tablet together in what appears to be a warehouse or office setting. The man is on the left, and the woman is on the right. They are both focused on the screen. The background is slightly blurred, showing shelves and equipment. The overall tone is professional and collaborative.

REGIONAL SALES MANAGER LIONELS VETERINARY SUPPLIES

”

“When comparing our achievements to that of industry colleagues who don’t use Field Sales software, we’re certainly outperforming them. Our reps have also increased their daily visits from around 3 to a consistent 8 since we’ve gone digital.”

Lionel’s Veterinary Supplies is focused on the provision of products which enhance the health, well-being and performance of animals, supplying products to co-ops, vets and the commercial agricultural sector. Lionel’s ordering was done via email which meant one-way, delayed communication and that accurate information was not available in real-time. Going digital with the right sales technology has completely opened up the line of communication between the office, warehouse and sales reps in the field.

BUILD IT OR BUY IT?

06



Some companies choose to develop their own solution to meet their specific requirements. Along with a high upfront development cost and a long lead time to develop the technology, they often underestimate the on-going cost of building new features or supporting the technology in the long run.

Companies change their business processes, integration needs may change when other systems change, the original developer may leave the company – can you really afford to cope with those bumps in the road?

If you use your own internal team, keep in mind that developing and maintaining the technology will also distract them from developing your company's other tech needs, and while you're building your own solution, your competitors will be making more sales.



DIRECTOR KIRK MARKETING

”

“Field Sales technology has been a valuable addition to our reps’ day-to-day activities. It has enabled them to get things done on the road that they would normally have to do the next morning, so it is giving them more time to sell – more face time with customers.”

Kirk Marketing is a provider of tiling and tile trim products for carpets, tiles, vinyl and laminate and wood flooring, with over 22 product ranges. Kirk Marketing struggled with rationalising, presenting, and capturing its sales material and orders. Going digital with their sales technology has helped with their reporting, call rates, call cycles, training, and presentation of information. Sales technology has also helped them from a service point of view, to act and react faster to customers’ needs and wants.

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9 IMPORTANT THINGS TO DO BEFORE YOU BEGIN YOUR SEARCH FOR THE RIGHT SALES SOFTWARE

07



Before you begin your search for the ideal software, reflect on your current challenges and pain points. By conducting the due diligence upfront, you are 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.



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.



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.



04 LIST YOUR REQUIREMENTS:

Once your ideal sales process is mapped out and clear, list the requirements the chosen software must support. Mark the requirements that are “must haves” and “nice to haves”.



05 LIST ALL THE PEOPLE AND SOFTWARE INVOLVED IN YOUR SALES PROCESS:

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 AND EXPECTED ROI:

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 the key results you need to achieve to feel that you are getting your money's worth?



07 CONSULT YOUR INTERNAL IT PERSON:

If you don't have an IT person, speak to someone who knows technology and your business well to ensure you are choosing a solution that fits in with the current technology you are using and have envisioned for your business.



08 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.



09 READ THE FIELD SALES SOFTWARE BUYERS GUIDE:

Software specifically or another type of sales software, our software buyers guide is full of important questions to ask, features to look for, things to consider as well as tips to ensure you make the best choice for your business. You can [download it here](#) – no registration required.

The background of the entire image is a large warehouse with high ceilings and blue metal shelving units filled with boxes. In the foreground, three people are gathered around a desk. On the left, a man in a dark blue suit jacket and patterned shirt looks at a computer monitor. In the center, a woman in a light-colored blazer looks on. On the right, an older man in a white polo shirt points towards the monitor. The scene is dimly lit, with the primary light source being the computer screen and some ambient warehouse lighting.

HEAD OF SALES ZEBRA MEDICAL

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"Having our accounting system integrated with our Field Sales software allows our reps to get their sales figures daily instead of getting a sales report weekly or at the end of the month."

Zebra Medical is a medical distributor to over 200 hospitals and specialists. Most of their old systems ran on paper and video calls with Excel reporting, and one of the big challenges they faced was just trying to report to a manager. With the correct sales technology all of their processes have become automated, and they can get that information in real-time, as they need it, from all over the country.

ABOUT SKYNAMO

08



Skynamo is the leading field sales management software and field sales app used by manufacturers, wholesalers, and distributors to manage their field sales operations, and capture orders and information in the field.

Field sales managers and business owners use Skynamo's cloud-based software 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, capture orders 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 provide improved order accuracy and order fulfilment turnaround times. Skynamo customers typically experience an increase in sales of up to 20% in their first year, and a doubling of customer visits thanks to increased efficiency and productivity. They also experience smarter sales decisions that enable managers to coach their teams, and sales reps to become valued consultants to their customers.

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

