B2B FIELD SALES SOFTWARE BUYER'S GUIDE

FOR MANUFACTURERS, WHOLESALERS, AND IMPORTERS WITH SALES TEAMS IN THE FIELD. THIS GUIDE HELPS YOU NAVIGATE THE VAST GALAXY OF SALES SOFTWARE AVAILABLE, ENSURING YOU INVEST IN THE BEST SOFTWARE FOR YOUR BUSINESS AND YOUR SALES TEAM.

2ND EDITION 2023

THE FIELD SALES SOFTWARE
BUYER'S GUIDE

01

INTRODUCTION

You likely downloaded this guide because you're about to take a big leap forward in how you manage your field sales team and enable them to substantially increase their productivity.

You want answers to practical challenges you're facing. How do I manage my sales team better? How can I improve their productivity? How do I take care of my important customers proactively? If you want the tools to give you these answers, you're in the right place.

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?

Do you understand your customers' buying behaviours or patterns?

This lack of transparency leads to inefficiency and potentially to lower trust between you and your team.

The right field sales software for management will give you a clear understanding of what's happening in the field. You can easily access data, no matter where or when you need it. You will get predictive insights into what is most likely about to happen with your most important customers – if the app has that capability. In short, the right sales software will elevate your management ability away from "sales nanny" towards being an exceptional sales coach and mentor.

The right sales software for salespeople will heighten their productivity, and boost their ability to close sales. Not only that, but it will also transform them from being "order takers" into trusted, well-informed advisors. It helps guide their conversations with customers towards a win-win outcome.

This Buyer's Guide is designed to help you choose the optimal field sales software partner to maximise your sales, your team, and your data. This guide will ensure you ask the right questions, and focus on the right features and functionality, so that your unique business needs are met.

18%

18% of business owners and mangers surveyed said the lack of visibility into field sales activity was their biggest challenge. They wanted to feel confident that their team was visiting the right customers at the right time and working on the right things. They feared that sales reps were not being effective or efficient but had no real way of knowing.

02

ERP & FIELD SALES SOFTWARE (WHY YOU MIGHT NEED BOTH)

Enterprise Resource Planning (**ERP**) systems are powerful tools. **They unify back-office and front-office tasks and are essential for companies with production, logistics, and complex operations. ERP systems are ideal for office staff, for pipeline management, and for managers.** However, they lack field sales capabilities. An ERP system cannot report on field sales activities, and it often leaves your field sales reps fending for themselves when attending to job critical tasks while out on the road. ERPs lack functions such as activity tracking, order capturing, and mobile friendliness.

For companies with out-of-office sales reps, a **field sales software** is a must. It **streamlines and optimises the entire lifecycle of product sales, and ensures reps and managers have the right data at the right time.**

Perhaps one of the bigger differences between ERP software and Field Sales software is their focus on different parts of the customer journey. Most ERP systems focus heavily on customer acquisition, accounting, inventory, and operations. Field Sales software focuses on customer retention and growth and regular, short-cycle product sales to an existing customer base.

So, what do you need? ERP or field sales software? Depending on the size of your business, you may need both. These can be integrated to work together seamlessly. This not only improves field sales productivity and accurate data collection, but it also streamlines product sales and customer relationship management.

52%

52% of business owners and managers surveyed expressed "too much admin for their reps" as their biggest challenge. It was seen as diverting time away from visiting customers and selling.

8 BIG THINGS TO DO *BEFORE* YOU BEGIN YOUR SEARCH

QUESTIONS & CONSIDERATIONS

Before you begin your search for the ideal software partner, take a moment to reflect on your current pain points and challenges.

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. Factor into your goals how you foresee your business can overcome rising inflation, the uncertainty and disruption of loadshedding, and supply chain issues.

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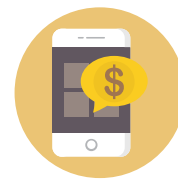
Reduce these things

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

Cut down on delays in order fulfillment

Reduce number of product returns due to inaccurate orders

Improve these things	Increase these things
☐ Visibility into the day-to-day activities of your field sales team	☐ Frequency of customer visits
☐ The level of detail and accuracy of call reports	☐ Adoption by your field sales team of your sales process and workflow
☐ Order accuracy by adopting systems which reduces human-error during data entry	☐ Insight into who your most profitable customers are and where your reps should be spending more time.
☐ Standardise and simplify information collection during customer visits and adopt a system that compiles it in a way that generates insightful reports	☐ Improve the accuracy of data that sales teams access and submit in the field.
☐ Insights into competitor penetration of your customer base	

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

Also, where possible, quantify your goals. This will help you manage and communicate expectations, as well as measure success.

For example, you might want to increase the average number of daily customer visits by 50%, or you want to improve sales by 20%. Have those goals on hand and share them with the partners you evaluate.

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. This will ensure the most efficient process is followed and all necessary tasks are completed.

However, it is important to note that implementing sales software cannot be considered as a silver bullet. For this reason, it is important that you commit to continually improve every stage of the sales process. This will ensure that you get the most out of your new sales software.

03

CREATE A LIST OF THE SALES REPORTS YOU NEED

You have a lot of data, but you might have no clarity. Sales reports give you the information you need in a way you can understand it, so that you can make the right decisions. First, identify what sales reports you need. Then you will know if the field sales solution you are reviewing has sufficient business intelligence / sales analytics capabilities.

Have this list handy when you speak to a software partner. Ask them to show you how their solution will process data into reports. Find out if these reports are out-of-the-box or only possible through customisation. Ideally, your solution should have sufficient out-of-the-box reporting that you don't have to spend extra on creating bespoke reports.

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

?

Who are my most profitable customers?

?

Which customers are buying less over time? Which are buying more?

?

Which customers are overdue for a visit?

?

Do more visits to a particular customer result in more sales?

?

Are customers being visited frequently enough? How many are unscheduled visits?

?

Which customers were visited today? By a particular sales rep?

?

Who are my top 10 customers by sales revenue? This month? This quarter, or year?

Make sure the software partners you speak to can provide you with the insights you need to make smart sales decisions.

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

?

Who are my top sales performers? By activity? By close rate? By sales revenue?

?

What is the average time my reps spend with customers per visit?

?

Are my sales reps going to reach their targeted number of customer visits this month?

?

Are reps missing customer visits?

Make sure the software partners you speak to can provide you with the insights you need to make smart sales decisions.

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

?

What are my top selling products? Per region? Per customer? Per customer group?

?

How much of a particular product have I sold this month compared to last month? Compared to last year?

Make sure the software partners you speak to 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 9 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 sales 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 sales processes.
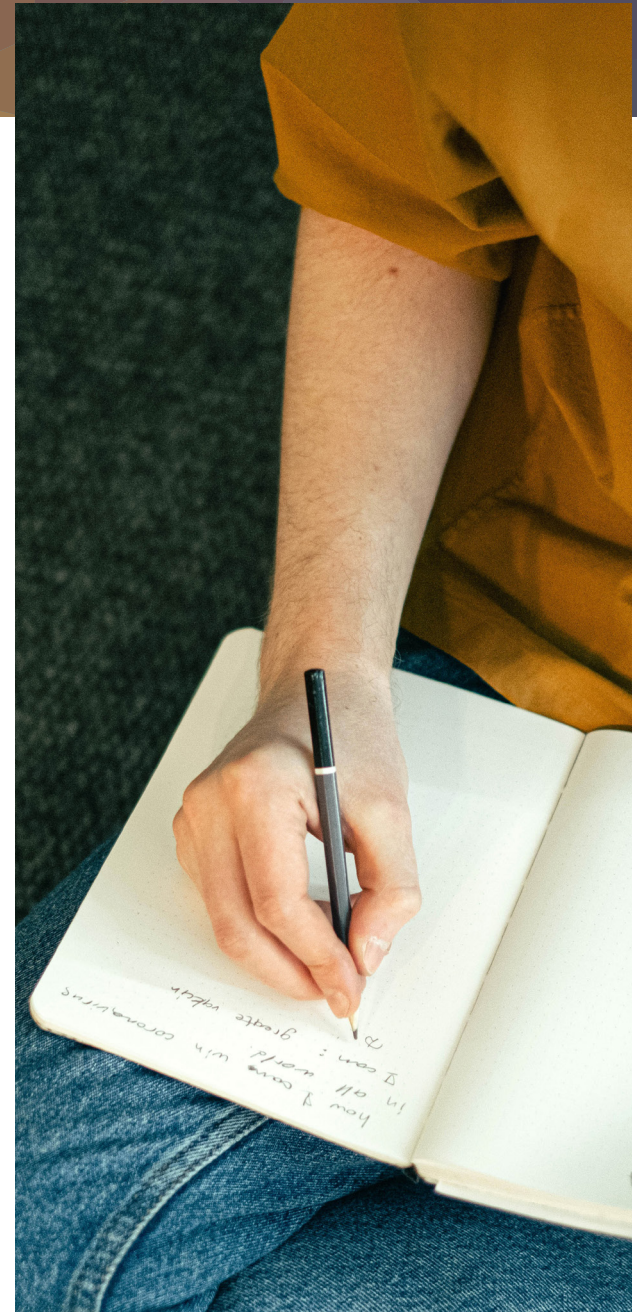
05

LIST ALL PEOPLE AND SOFTWARE INVOLVED IN YOUR SALES PROCESS

Most software solutions have two types of expenses: implementation (once-off), and licenses (monthly). For you to get an accurate understanding of what your total monthly cost will be, you need to know how many licenses you need. Make a list of 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? Do you need to integrate existing business or ERP software with your field sales software? These two questions will need clear answers to determine your final set-up and monthly or annual costs.

Most software solutions have two types of expenses.
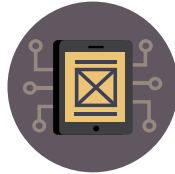
Implementation
(once-off)

25

Licenses
(monthly)

For you to get an accurate understanding of what your total monthly cost will be, you need to know how many licenses you need. Make a list of how many people are involved in maintaining your customer relationships, fulfilling orders, and managing and supporting your team.

**The two questions that require clear answers to
determine your final set-up, monthly or annual fees.**

? How many people will
the software support?

? Do you need to integrate
existing business or ERP
software with your field
sales software.

06

CONSIDER YOUR BUDGET AND EXPECTED ROI

To manage your own expectations, ask yourself the following:

1

What are we able to and willing to pay per month or per year to achieve our goals, overcome our challenges and alleviate pain points?

2

What are we expecting the return on our investment to be?

3

What are the key results we need to achieve to feel that we are getting our money's worth?

07

CONSULT WITH YOUR IT DEPARTMENT

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

08

DECIDE HOW IMPORTANT DATA SECURITY IS TO YOU

Nowadays, most software runs "in the cloud". This 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.

"

"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.

TOP 9 FEATURES & FUNCTIONALITY TO LOOKOUT FOR

Every sales solution has a bouquet of unique features. How will you know what to look out for? We've listed the top 9 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 first and possibly mobile 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 mobile devices.

It's important to make sure that the field sales software you choose has been designed primarily for use on the mobile device. This ensures your team has a superior end-user experience in the field. When you give your sales reps a better end-user experience, they are more likely to capture more accurate data in the field and show higher adoption rates of the new software.

It is also important to note that the software should be compatible with the mobile devices your team uses, 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 to give your field sales team accurate pricing, product, stock level and customer information in the field. This is best achieved by integrating your accounting package or ERP software with your sales CRM app. 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. Ask if they have done an integration of their software with it before. Ask for costings to do so. Find out how long this integration might take.

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 is to struggle with an integration that only works half the time.

Choose a vendor with an integration certified by your ERP or accounting software package. Or one that has successfully integrated their solution with the ERP and offers ongoing support for this. 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

CUSTOMISABLE FORMS

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

You need a library of predesigned templated forms, plus the ability to build an unlimited cluster of your own forms. These could be health and safety requirements, contracts and signing, and industry or competitor insights.

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

O4

OFFLINE CAPABILITIES

Whether your reps work in remote areas with poor internet access, catch up on work on a plane or while in traffic, or visit a customer in an area with no internet access, lack of internet access should not prevent your reps from accessing information and functionality in the field sales software.

Ensure the field sales software 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 using it.

Constant navigation on the road:

Saved maps and GPS functions work offline, so planned routes remain available to reps.

Longer battery life:

Offline apps are less likely to drain the 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 are experienced.

05

VOICE-TO-TEXT FOR NOTETAKING AND DATA CAPTURING

Your sales team is often rushing between one customer visit to 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 AND VISIT FREQUENCY

Your sales teams may need to visit customers periodically – e.g. on the same day every visit to ensure they have stock. Or maybe you 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

If your sales reps use paper forms or Whatsapp to capture orders offline, the likelihood of data entry error and delays in order fulfilment is high. This is because the order must first be 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 products, to delivery and payment.

08

INVENTORY MANAGEMENT
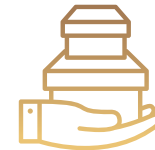
Another very important feature of sales software is the ability to manage and update inventory as products are being sold. This will help sales representatives to reduce shortage costs, time, and out-of-stock administration.
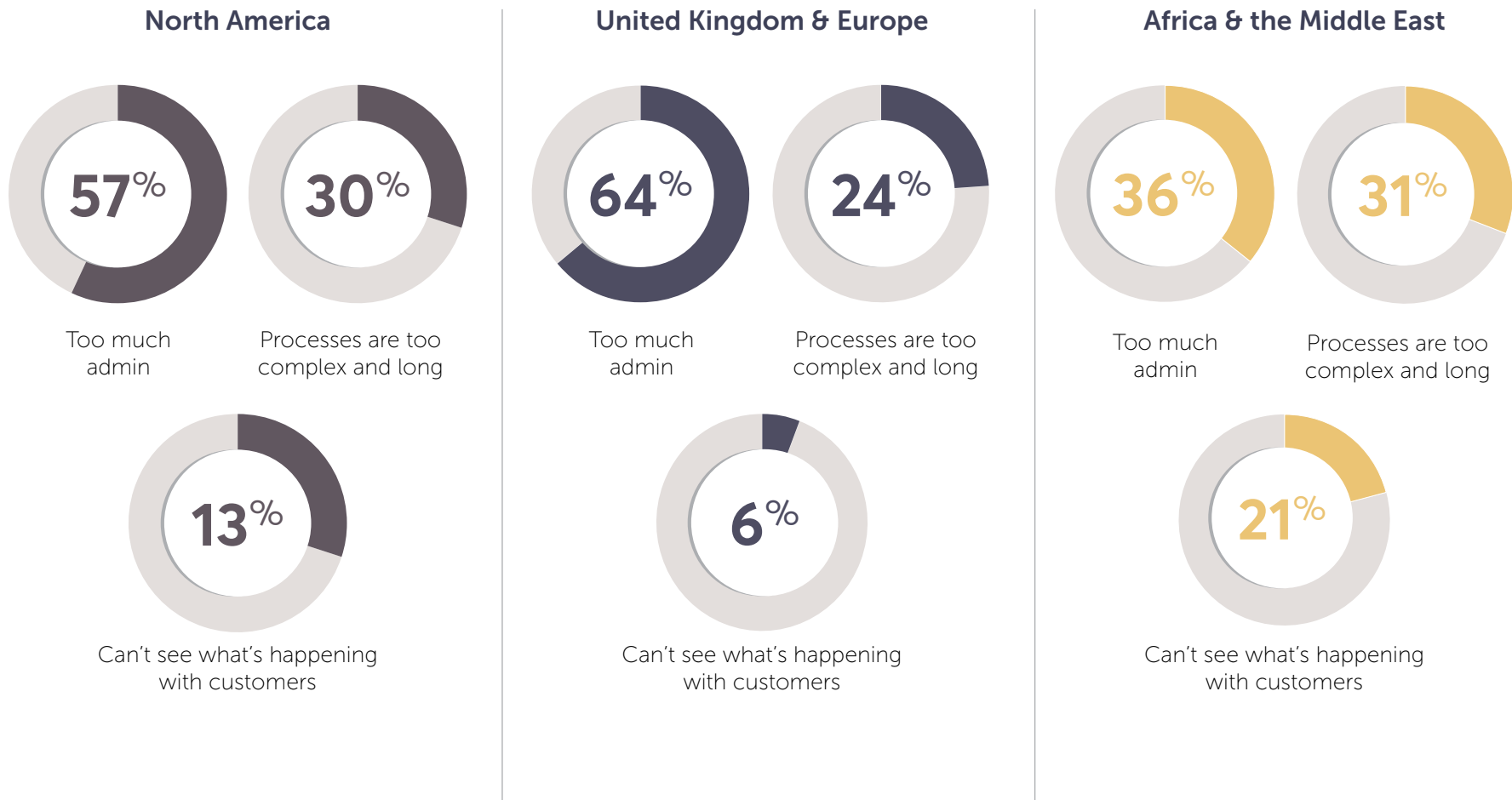
09

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 the tracking of users while still providing the many time-saving features GPS tracking provides.

We asked business owners, sales managers and reps, in three different regions, what they found the most challenging about their jobs and daily activities. Their responses revealed three main challenges that were almost identical across the three regions surveyed:

North America

57%

Too much admin

30%

Processes are too complex and long

13%

Can't see what's happening with customers

United Kingdom & Europe

64%

Too much admin

24%

Processes are too complex and long

6%

Can't see what's happening with customers

Africa & the Middle East

36%

Too much admin

31%

Processes are too complex and long

21%

Can't see what's happening with customers

18%

"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 OF SURVEY OF OVER 200 FIELD SALES REPS. "THE FIELD SALES TRUST GAP REPORT" BY SKYNAMO.
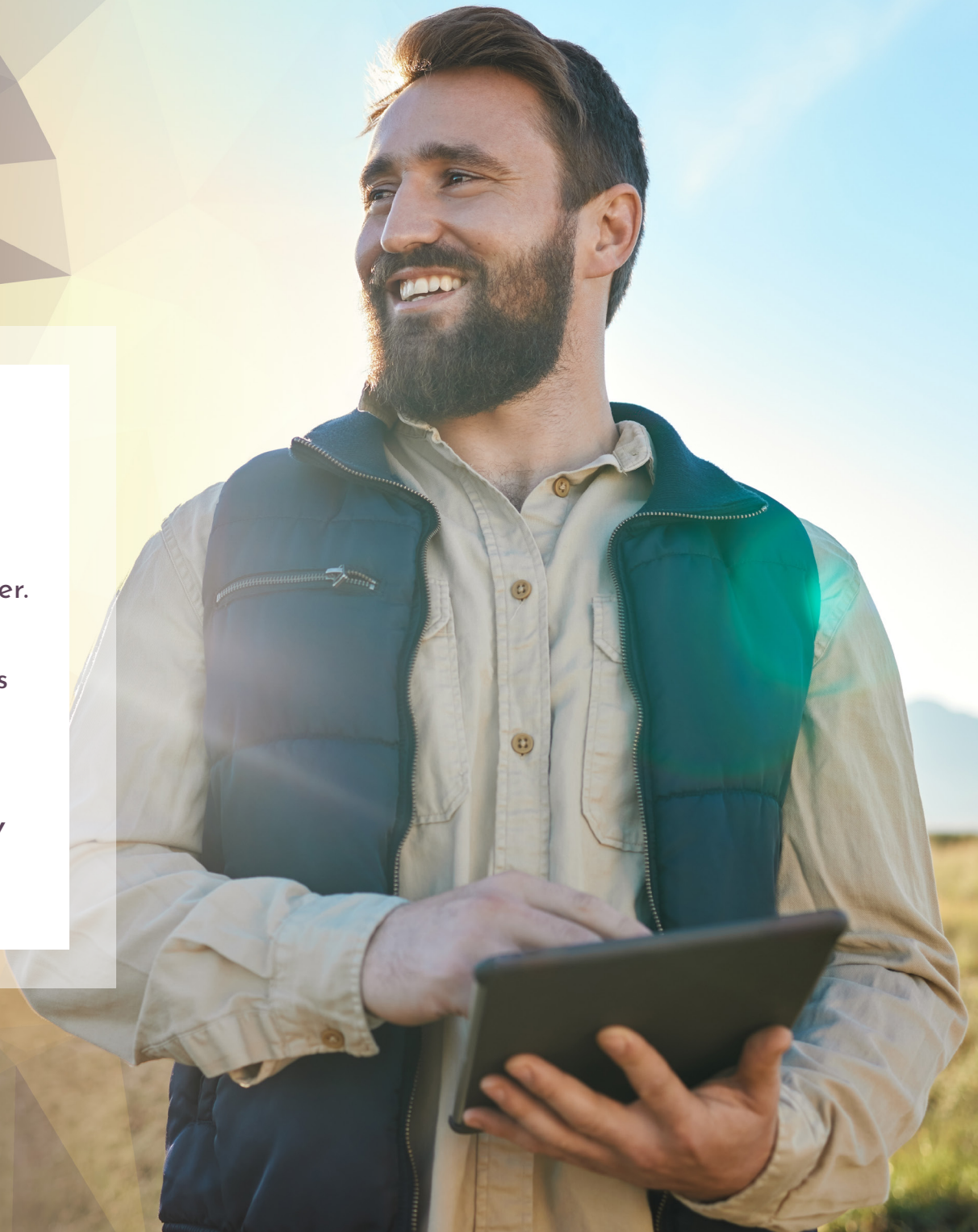
05

QUESTIONS SMART BUYERS ASK.

Your focus is sales, not software. So, as a software buyer, you don't know what you don't know. Here is a helpful list of questions to ask a software supplier. It should highlight things you need to bear in mind and know the answers to, before deciding on which software partner to choose. It will help you identify which partner provides you with the most cost-effective solution to meet your specific requirements.

GETTING STARTED AND 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 transactions or orders captured? Or charges for running and maintaining the integration between the software and your accounting package or ERP software.
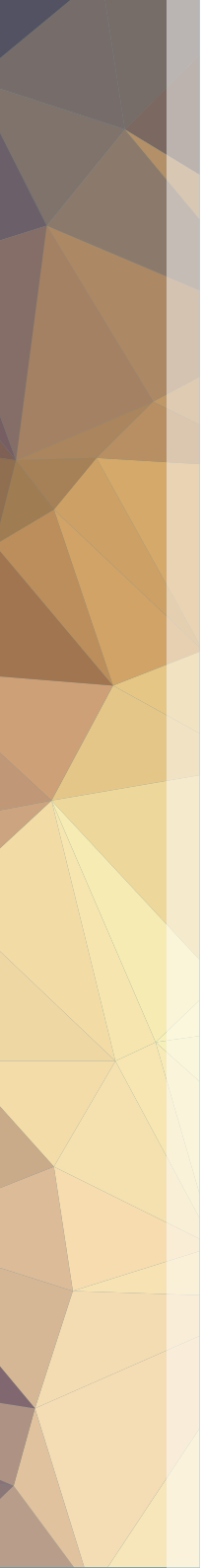
How much data does a mobile user typically use in one month on the field sales software or app?

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 the minimum device 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.
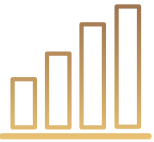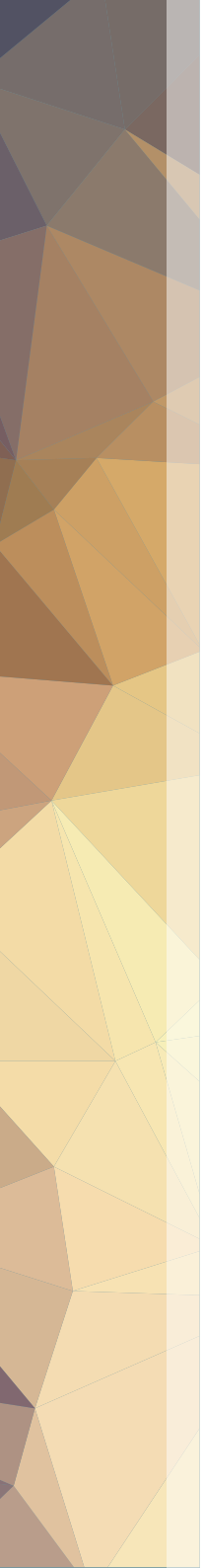
SALES ANALYTICS AND REPORTING

How will they support your data insights and provide reports you need?	Do they have a dedicated team of data analytics specialists?

Are there reports designed to support each role, e.g. managers, and sales reps?

This is important, because your business is unique, and you have specific questions you need answered by customised 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 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?

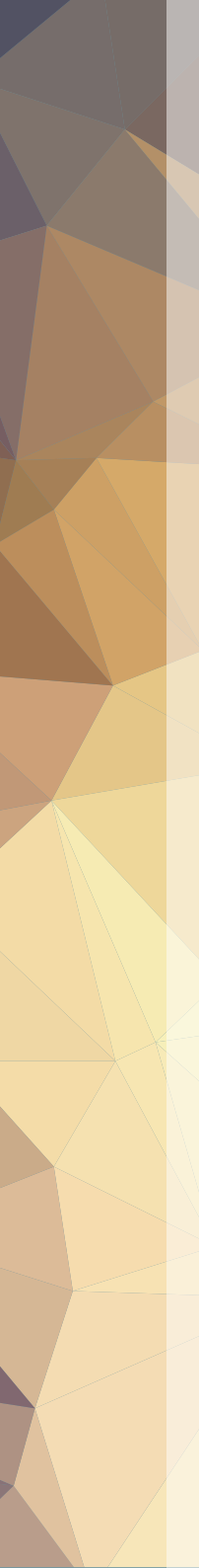# SECURITY OF YOUR LONG-TERM STRATEGIC INVESTMENT

What is the company's track record? What is their business tenure, investment, types of customers (big and small), what are their peer reviews as well as customer reviews, and their global footprint?
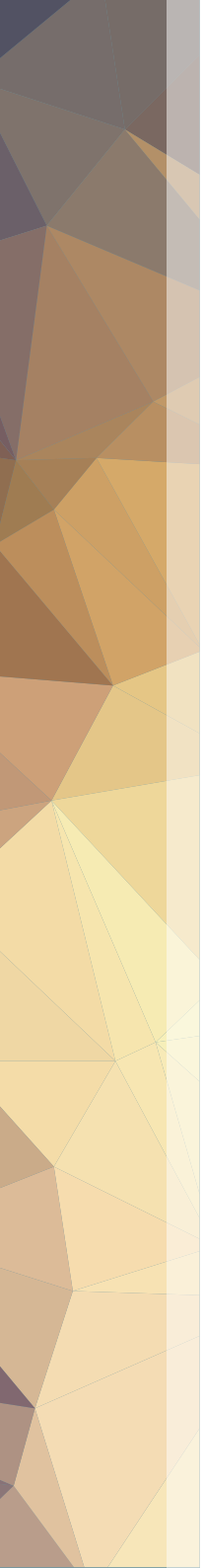
How many developers do they have working on the product? Are they reliant on only two or three developers who might leave the business and put your long-term investment in the software at risk? A larger development team ensures product knowledge rests not only with one or two key developers and that 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 contains 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?
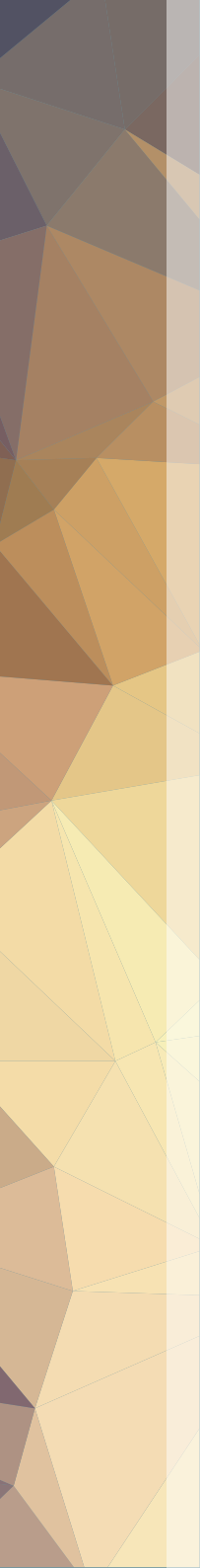
AFTER-SALES EXPERIENCE
## (TRAINING, ACCOUNT MANAGEMENT AND SUPPORT)

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.
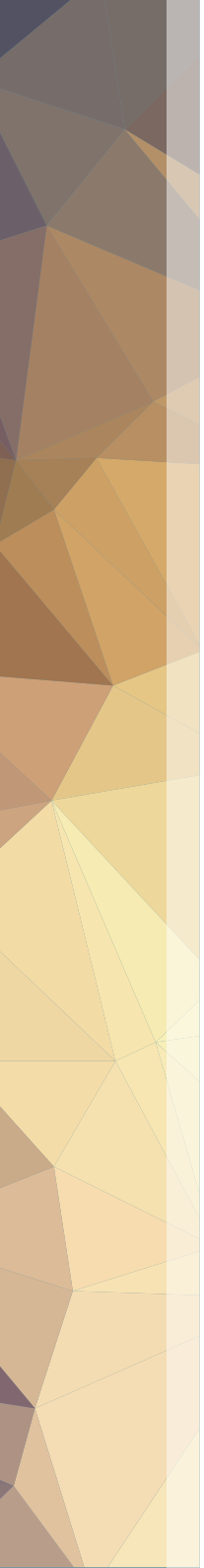
Do they have a dedicated Support team? How much does Support cost? Even with great training and a great product, quick and easy access to Support is vital in ensuring your team remains productive even when they experience technical issues.

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 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.

"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.
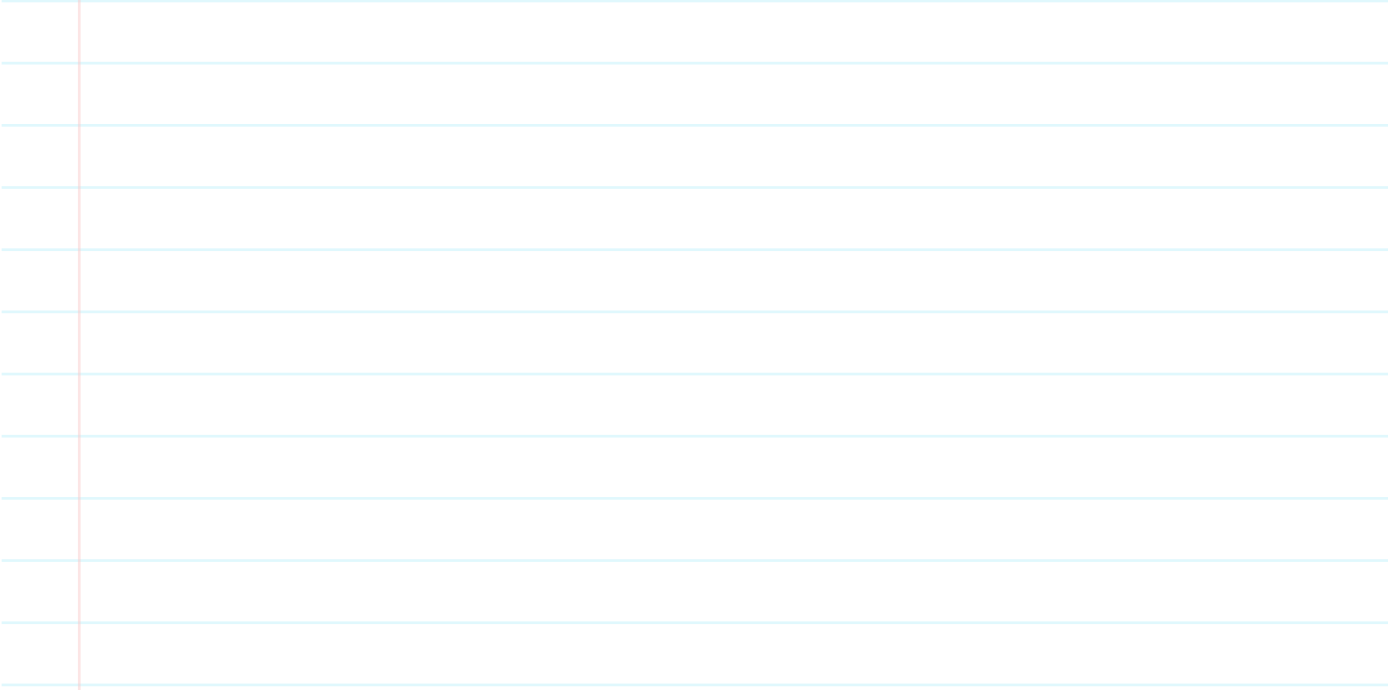
CONCLUSION

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 business and industry. We welcome your feedback concerning information you feel we should include, so that we can review and consider it for inclusion in future editions of this guide.

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

YOUR NOTES

G2 | CROWD

★★★★★

"Wonderful, efficient and commercially valuable"

Leader
SPRING
2023

Best Relationship
Small Business
SPRING 2023

High Performer
Mid-Market
SPRING 2023

Best Est. ROI
SPRING
2023

Best Relationship
Small Business
SPRING 2023

High Performer
SPRING
2023

Skynamo is a field sales software provider with more than 100 employees in the US, the United Kingdom and South Africa. Skynamo's field sales mobile app and cloud-based management platform are used by small to large manufacturers, as well as wholesalers and distributors with sales teams in the field selling to an existing customer base.

Nearly 1,000 companies in the United States, the UK, Europe, Southern Africa and New Zealand run the field sales operations with Skynamo.

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

Skynamo