

Securing the Future - CRM Tools to the Rescue - A Success Story

Consider this scenario: You have a business problem. You spend a fortune to hire a consultant who gives you expert advice on rectifying the problem. You go on to execute the recommendations. Things move on well for sometime; but soon cracks begin to appear on the surface. You cannot afford to bring in a consultant again to fix the mess. Whose fault was it? What went wrong?

More often than not, such scenarios can be avoided by applying one simple rule at work: Always give **auditing and tracking** their due credit.

This case study talks about how KVP Business Solutions reinforced our client's steady growth path by ensuring that the important functions of monitoring and tracking are not sidelined.

The Client

Our client is a 50,000-people-strong market leader in the beedies space. While their pan-India presence enables them cater to customers across the country, they also export products to over 16 countries across the globe. Catering to a clientele that cuts across all social and economical strata demanded a **strong**, wide-spread and **decentralized** sales team. This, in turn, necessitated close coordination, scrutiny and monitoring to keep malpractices at bay. KVP was brought in to devise a **fool-proof** auditing and tracking mechanism to keep the sales team up on their toes and motivate them to further excel at work.

Challenges

There were several challenges that came by our way:

- The decentralized sales team operated out of different offices spread across the country.
- Each area/location catered to a unique blend of customers, which often resulted in **unique selling practices**/techniques.

The Client

- A market leader in the beedies space catering to customers across the country and in 16 countries abroad.
- Looking for an effective means of tracking the activities of their sales team to improve customer engagement

The Challenge

- A decentralized sales team with unique selling practices
- Selling the idea of tracking work to employees is always a difficult task
- Important to ensure that any new system is accessible and easy to use

KVP Advantage

- Well experienced, tech-savvy team with good understanding of the sales processes and techniques
- Well versed with auditing practices
- Young and dynamic members
- Cost effective



KVP's Proposal

- Tweak current sales processes to improve sales productivity
- Develop a monitoring process in conjunction with sales processes
- Use the power of CRM tools to document, track and improve the activities of the sales teams

Align the client's sales processes with industry best practices



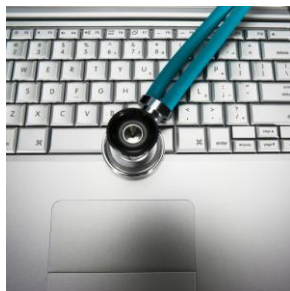
Identify different aspects of sales and distribution that should be tracked on a regular basis



Devise a reliable and effective means of documenting, reporting and tracking sales activities and use this information as a management tool for auditing and budgeting



Complement the current IT infrastructure with a customized and integrated CRM system to standardize and audit the functions of the decentralized sales team



- Tracking and monitoring systems often face **stiff resistance** from employees.
- Any tracking system with a **long learning curve** is doomed to be shunned by users.

KVP's Collaboration

KVP was entrusted the work of developing and implementing a simple, **light-weight** and **reliable** tracking and **monitoring mechanism** for improving sales efficiency. In the era of rapid technological advances, we decided to **leverage the power of IT** to meet our objective. However, our first task was to study the requirements of the client and get an insight into their current operations, sales techniques employed, existing IT infrastructure, etc. We proposed to tackle the challenge using a **three-step approach**:

- Improve current sales processes to obtain maximum productivity
- Develop a tracking mechanism in alignment with sales processes
- Use a customized CRM tool to standardize sales and tracking processes

Sales Process Re-factor

We carefully studied our client's current operations and analyzed the techniques adopted by their sales personnel. Our strategic market development experts then made several recommendations to improve the existing processes to ensure **effective customer engagement**.

Development of Well-Aligned Tracking Mechanism

As the second step, we proposed to develop an IT-enabled tracking mechanism in complete sync with the re-factored sales processes. Our tracking system dwelt up on the following areas:

- **Market Status Reporting:** A centralized system to record market intelligence obtained by the sales team which can be easily retrieved by the management.
- **Sales Network Monitoring:** A system that defines and captures all the stages of a sale that would be used to track the progress of each enquiry at hand.
- **Sales Promotion Tracking:** A system to track campaign costs which would be used as management tool for budgeting and auditing.

- **Day-to-day Transaction Reporting:** A tool for documenting daily transactions of sales personnel including clients visited, enquires collected, ordered booked, etc.
- **Team Audits:** A system for employee assessment to identify gaps, define goals and chart out training programs.

Leveraging the Power of CRM

Having laid the foundation for the tracking mechanism, we began scouting for the right software tools to enable us achieve our objective. We zeroed in on a Customer Relationship Management (**CRM**) tool in consultation with our client and took upon us the task of **customizing** it to suit the specific needs of the client. Once customized, our experts would **train** the client's personnel for **using and maintaining** the tool in future.

Benefits

We, at KVP, understand that prevention is better than cure; and what better way to prevent than to track on a regular basis. Tracking and monitoring the activities of personnel, **if done unobtrusively**, not only helps achieve goals faster, but also motivates employees do a **self-check** at each stage to realign their actions in accordance with corporate expectations. We enabled our client apply these thoughts into action and reap the benefits of a sound auditing mechanism at **minimum cost** and **time**. Our **customization** and **training efforts** ensured that there was a very **small learning curve** for our client to ramp up to use the new technology.

If you found this case study interesting and would want to know more about how KVP can collaborate with you to improve business, then visit us at www.kvpcorp.com or write to us at info@kvpcorp.com.

Benefits

- A win-win situation for the client
- KVP provides timely support to strengthen the client's leadership position in the market
- Re-factor of sales techniques to improve sales productivity
- Decisive steps to closely track the functioning of sales personnel at both the micro and macro level
- Investing in a CRM tool to enable the client track the progress of every enquiry without any manual intervention.
- KVP undertakes the customization effort, thus saving several man-hours for the client

