

Building an Effective Inside Sales Function

Several attempts to launch an effective Inside Sales function fell short of expectations and ISRs were performing customer service activities and not making proactive outbound calls to increase sales.

Business Issue

An industrial manufacturer had Inside Sales activities' occurring in 3 different Business Units (BU), each falling short of their objectives and operating without consistency or effective processes. They had tried several approaches to build a leveragable inside sales function without success. Many factors contributed to this that needed to be addressed, from a lack of management focus to inconsistent practices. Further investigation revealed:

- Shared account responsibilities with Field Sales, created account ownership uncertainty and poaching of accounts
- Outbound calling activity was limited by designated service responsibilities
- An inconsistent approach in using sales incentives to motivate inside sales behavior
- No systematic approach to proactive selling into target accounts was utilized
- Lack of direction and leadership caused the focus to evolve inappropriately
- No processes or rules existed to determine the appropriate accounts to pursue or how to ensure proper transition between the inside and field sales functions
- Inside Sales application was inconsistently used by the team and lacked many fundamental capabilities to be a useful Inside Sales tool

Adroit's Role

The design of the blueprint for the new Inside Sales team focused on developing: the organizational structure; roles & responsibilities; key processes; systems requirements, tools & metrics; and deployment of the new team.

Activities included:

- Developing an organizational structure that refocused the Inside and Field sales teams on accounts they "own"
- Repositioning the Inside Sales role as a team member of the sales force
- Analyzing the customer base and defining the target account profile best suited for Inside Sales
- Defining the account selection process, territory sizing, and account management guidelines to assist with the change management aspects of the new role
- Developing job descriptions and designing a leveraged compensation plan to reinforce investment
- Defining performance metrics for Sales Management to utilize to measure the success of the Inside Sales reps, and defining their role in managing these resources
- Creating a training program that included a "Day In the Life Scenario", marketing tools and sales scripts, performance metrics, and Inside Sales System training

Outcome

The results of Adroit's recommendations led to:

- An Inside Sales organization that is implemented - armed with all the tools needed to be successful - appropriately assigned accounts, sales scripts, compensation plans, performance metrics, and sales management support
- Sales management positioned to effectively manage and coach Inside Sales resources
- A collaborative sales environment between the Inside and Field sales functions, allowing for smooth account transfers and increased customer satisfaction