ACT and Outlook are Holding Your Business Back

How to Make the Competition Look Like Chumps Without Spending a Mint

by Craig Klein

There is tremendous potential locked up inside your business -

- The power to grow beyond your wildest dreams.
- The power to take the competitive high ground away from your competitors.
- The power to make every day a pleasure instead of a struggle.

You can unlock that power today, without busting the budget!

Where is this power? Why is it locked up? How do I unleash it?

If you're ready to face the truth about your business and take your sales and service capabilities into the stratosphere, then please read on!

Every single day things are changing. They're getting faster and faster and you're wading through more and more information.

The same thing is happening to your customers. They want answers now! They're overloaded with information they can't use. They need reliable partners that can give them specific, useful information quickly, on demand.

The most important message you need to know now:

If you cannot provide answers and solutions quickly enough, your customers will find someone who works at their pace. Each customer has their own unique pace and sure, there are some that like to take their time but, that group is getting smaller.

To attract and retain customers today, you need to gear your organization to respond at lightning speed.

A few years ago, it may have been OK to say to a customer "Your sales rep is not in right now. I'll have to pass your question on to him and ask him to get back to you this afternoon". It is not OK to make your customer wait anymore.

Remember – this same thing is happening in your customer's business. Imagine that you're customer has just been through a transition designed to provide more information to their customers via online resources and faster response times to customer inquiries. Then you explain to her that no one in your organization can answer their question except her sales rep, and they're on a plane or on vacation.

That's right. Your customers' expectations are being set not by your competitors but by their experiences in their own businesses and in their personal lives. They're information gathering and purchasing is done online more and more often. They don't see the need to wait anymore. Their customers aren't giving them that luxury so, why should they give it to you.

So a few years ago, you started using a contact management system like ACT, Goldmine or maybe just good old fashioned Outlook to keep track of names, phone numbers and emails. Good idea!

If you're lucky, you've gotten to the point where you have up to date contact information about all your prospects and clients. If you've really worked hard at it, perhaps you even have it all in one place and all your employees are keeping good consistent notes about their interactions with customers.

Most companies that have attempted to use ACT or Outlook for contact management end up with 3 very problems:

1. The information is in each employee's own list or database. It's not combined into one organized list that everyone can use.
2. Technical challenges cause the information to be inconsistent and unavailable too often.
3. The most common problem experienced by businesses like yours everyday – Employees just aren't keeping the information in the system up to date.

Obviously, this is just not good enough. And more importantly, it's not been cheap or easy to use things like ACT or Outlook or other contact management systems in this way.

But the real point here is that you still can't respond instantly to any and all customer inquiry using your current system.

Good news! The solution is simple and it's not expensive or time consuming -

You just need to have all the information in one place. ...In a place that everyone on your team can access anytime, from anywhere without the hassles of maintaining all the servers and databases yourself.

Imagine!

You're customer calls in and asks for their sales rep.

Your receptionist says "Bob's not in right now, how can I help you?"

The customer explains their question.

The receptionist says "Well, I see that Bob's in a meeting right now and he should be free at 1pm. If I can't answer your questions, I'll make sure Bob calls you at 1pm."

Then the pay off – the receptionist says "I see the proposal that Bob sent you last week. What questions can I answer for you?" Your customer is getting answers immediately. That's what she wants and it's what your competitors are not giving her!

And now you're saying "Well that's not easy or cheap" right?

Well, this is one of those rare times where you are going to be thrilled that you're dead wrong!

Virtually every business struggles to create an easily accessible client information system. The dirty little secret is that the struggles have all been in the wrong places.

Stellar Customer Service is easier and less expensive than you think

You don't have to be in the Fortune 500 to build superior customer service into your business.

In fact, when's the last time you called a Fortune 500 company for service and came away impressed with the service you got?

The big guys have the resources to do whatever they want but, their size makes it difficult in itself. Why?

Because good customer service is mostly about information. When a customer calls, they want information: how to buy, how to use, how to pay, etc. From the customer's point of view, the measure of good customer service is two fold - how fast can I get what I need and how pleasant is the experience?

The larger the organization, the more layers and departments there are. That makes it tough to keep things simple for the customer.

For a small business, the problem is the opposite. There are normally a few key individuals that keep all the information in their heads. The owner, key executives, operational managers and sales reps are all too busy to stop and write it all down.

So there's the Catch 22... Key team members are running full speed trying to take care of things as fast as they can. They can't stop long enough to put important facts into a database so everyone else can use that information to help customers.

What if any customer facing employee in your company could look up a comprehensive status for the client on the phone? Everything they've ever bought, service issues they've had, pending orders, general notes about their application of the product, etc.?

Good news! It's not that hard to achieve. The truth is that the technology part of it is the easiest thing to get right. If you have some IT expertise on hand, it can be done with Access or even Microsoft Exchange. Solid CRMs or Contact Management systems can be had for less than $500 per employee per year, when you factor in all the costs of implementation, maintenance, etc.

So, the client calls and the person who answers the call has all the facts they need to help the client on the spot.

The client gets what they want - fast answers without having to talk to several employees while being transferred around, waiting on hold and repeating their story.

A couple of dollars a day per employee to kill your competition, thrill your customers and cut the tethers that are holding your business back.

But wait a minute... You've tried this right? You've spent the money on ACT! or Outlook. You preached and preached to your team about the value of using a contact management system. You paid an IT guy to set it up so everyone can share information. But it's not working. You're fed up with throwing money and time at the problem, right?

Are you tired of hearing its time to spend more money on ACT! upgrades, new servers and more IT hours?

Are you ready for something that going to work?

Well, the answer to your organization's service problems follows. Be prepared though... You have to be willing to hear some cold hard facts about the way you're running your business. If you're ready to hear what you've been doing wrong and do something about it, read on...

Reason #1 that ACT! or Outlook or whatever technology you've tried are not working for you:

It's not about the technology! It's about the people and being disciplined enough to record information about each and every contact with your clients religiously.

Sure, your best sales person will tell you that it IS the technology. In fact, you may wholeheartedly believe that all this would work out perfectly if the contact management technology just worked more like you do, or was more stable and reliable.

The cold hard fact is that its human nature to resist changing our habits. Especially if you're really good at what you do, you have developed habits that work very well for you and have been honed over years and years of sweat and toil! You're thinking may be "Why should I change such effective habits?"

The answer is that the brass ring that we're reaching for here is bigger than any one person in your organization. The power to respond to your clients is a crucial capability that you MUST have to grow your business and stay competitive.

If you're going to let individuals continue to be walking silos of information, then your organization's capacity to meet your customers' needs and to grow to the next level will always be limited by those individuals.

There is a freedom to act that comes from having the information available to the right people at the right time. That freedom propels your business into the stratosphere. It empowers mid and lower level staffers to grow your business for you, without you having to be involved in every transaction.

The cost is changing your processes and habits so that the information is recorded while it's fresh, in a system that others can access easily.

So, as much as anything, you have to sell your sales team and key customer facing employees on that power.

Many businesses try to soft sell the concept to top producing sales reps and key management staff. That seldom works.

Either everyone is 100% on board because they all believe in the opportunity to take your business to an entirely new level, or not.

This is not the place to go into a discussion of how to motivate and inspire your staff. For your information, here are a few articles I hope you'll find useful:

"Making Your Horses Drink the Water"

"Get Organized to Be Successful"

Reason #2 that ACT! or Outlook or whatever technology you've tried are not working for you:

You're telling stories, not sharing facts.

When most companies start using a contact management system like ACT! or Outlook, they're trying to minimize the disruption to the team so they simplify the requirements. Something like "Just keep the contact information up to date and put in a note about the calls and meetings you have."

That sounds simple and easy. Why wouldn't anyone play ball when the rules are so accommodating?

Because those same people don't get anything truly useful back out of a system like that!

Think about it. If you get a call from a customer and they tell you that they spoke with your inside sales person yesterday and got a quote for this and that. If you lookup the customer in your contact management system and see a 3 paragraph note, entered by your inside sales person, describing what the customer asked about and what they were told, you can't really use that information in real time. You're not going to put the customer on hold so you can read the inside sales person's notes. So, at that moment, you're probably not feeling like this contact management system is the best thing since sliced bread. This doesn't make you feel like that extra minute or two is worthwhile the next time you have some information to put into the contact management system. You know no one is really going to use it. Its too difficult to digest.

Tip #2 – make it easy to record information quickly, in the form of simple objective facts. Long tomes in the notes are the least valuable way to record information. They're too hard to digest and use. You want someone else who has never spoken with that particular customer to be able to look at their information and in less than 30 seconds, know essentially everything there is to know about that customer.

There are probably alarm bells going off in your head right now. You're saying "Well, of course but, I've got to spend a lot of time and money on a system that's totally customized to our business". You're right about one part – the contact management system DOES HAVE TO BE CUSTOMIZED TO YOUR BUSINESS!

But, the good news is that you're wrong about the time and money part! The only people who believe this should require a lot of time and money are the ones selling their time and technology to do such things!

You can do this with a little bit of thought and just about any kind of technology.

Tip #3 – figure out what you need to know about your customers before you start worrying about how you're going to capture and organize it with technology. What you need is a list of simple questions with simple answers that you can ask any customer get short answers.

In every business there are 5 to 10 questions that you have to have answers to before you know if a prospect is "qualified". Some of them are obvious:

- Am I talking to someone that can make the decision to spend money?
- Does this person have the money available?
- Is their need great enough to justify the expense?
- Which competitor are they using now?

...and then it starts getting unique to your business...

The toughest part about getting these questions right is being objective. Don't try to fit your questions around all your top customers today.

Try imagining that you're best friend is telling you about someone they met that may be a prospect for you. Remember, this is your best friend in the whole world. You can ask them anything shamelessly. What would you ask?

These are the questions you need to ask about every customer and record in your contact management system.

Here are few resources that may help you in developing these questions:

"Sell and Serve Customers Better by Putting Them in a Bucket"

"The Script that Gets Results"

Tip #4 – boil the potential answers down to simple facts. Envision a call sheet that your sales reps might bring with them on paper when meeting with prospects. Each question would be followed by the most common answers so that the rep can simply check off or circle those that apply.

That's what we're working toward in your contact management system! This is the only way we're going to empower quick and easy input of information and rapid access and use of the information.

It only takes one or two experiences in which a sales rep looks up someone they haven't spoken to recently and sees all this vital information staring them in the face in an easily understandable form. They're hooked. Now they're invested in making it work!

And best of all, adding these questions and answers to your contact management system in the form of simple fields with drop down lists is easy. If its not, you've spend too much money on your technology!

Tip #5 – start recording proposals, contracts, agreements, etc. in the contact management system so everyone can get to them immediately. This is pretty basic functionality for most systems. In fact, you don't even need a real contact management system for this. All you need is some $25/month shared drive on the Internet. As above, you've just got to make it easy for everyone to do their job and get the information attached to the database.

Hopefully you're seeing where we're going here.

At this point, we've got employees on board for taking things to a new level, even if it means breaking some old habits, and we've got some simple means of capturing key details about clients quickly and easily. All we need now is a way for the right people to have access to the information any time they need it!

Reason #3 that ACT! or Outlook or whatever technology you've tried are not working for you:

It's not instantly available to the right people at the right times in the right places.

Now you're seeing huge price tags right? Well, your experience thus far with Outlook or ACT! has been almost worst case scenario. You've paid for contact management software and you've spend hours installing it and connecting things to servers and maybe even set up synchronization between users. If you're trying to run a business at the same time, you're just plain out of time. Making all this stuff work right is not easy. Maybe you've got a top notch IT guy to handle it all but, he's not cheap.

And then, after all the expense of getting it all set up, you turn it over to your sales team. This should not be a secret: Your sales reps are going to be all thumbs when it comes to adopting new technology. They are not sales reps because they love to sit and figure out software.

Tip #6 – It has to be "brain dead simple" to use the system and it has to work reliably. If the people get a little lazy and just don't feel like putting the information in the contact management system sometimes, you are guaranteed to hear these excuses when you call them on it:

- The system was down.
- The sync didn't work.
- I tried but it crashed.
- It was way too slow.

And so on...

Its technology and its new to your business so, there are going to be glitches. Whatever you choose as your technology mix, you'd better be able to keep it running so its up when your sales reps need it. If they have trouble getting it to work when they need it, you are turning a touch challenge into a expedition over Everest.

The bottom line is you need someone who can put keeping it working front and center all the time. If you're going to use ACT! or Outlook or any other internally managed solution, you need someone on your staff that has the IT skills and the people skills to manage all this as a priority everyday.

Now, in today's world, the system really has to be web based unless you've got some major league IT infrastructure already. People work at the office, at home and on the road. They need access to your contact management system in real time, from all these places. So, if you want to run it internally, you've just ratcheted up the IT management costs another notch.

Take a look at this article written by a Charles Volz, an ACT! Certified Consultant, about the different options for getting ACT! available online.

Reason #4 that ACT! or Outlook or whatever technology you've tried are not working for you:

There's virtually no support. So now we're past whether the system is up and running properly. We're talking about whether each individual can figure out how to do what they need to do, day in and day out? Who's going to answer those questions every day? Is there a guru on your staff that can respond immediately to questions from your sales team about how to do this and that in your contact management system? If not, calling ACT! or Microsoft to find out is not something you want your sales team sitting through. So things stall. Business has to go on and the users go back to doing it the old fashioned way.

You need someone that's in tune with your business, that knows how you work and responds on your time, not their own.

Tip #7 – you're going to need someone to be your "go to guy". This could be your in house administrative or IT person. You need to make sure they make a priority of responding to problems and questions from the rest of your staff. Whether it's a staff member, your contract IT person or a vendor, take the time to bring them up to speed on what workflows are crucial for your people all day every day.

Remember, this does not need to be expensive or extremely time consuming. The toughest thing to do is to decide exactly what your people should do to capture, document and share vital information day in and day out.

If figuring that out is where you're stuck, I recommend trying to do it with the resources you have at hand. There will be some trial and error. Best to work through that without spending a bunch of money.

Once you understand the steps involved in each employee's key workflows, you may find that you can make your current technology work. If not, you'll know exactly what capabilities you need to shop for.

That transition doesn't have to be painful. Don't look for the technology to create the process for you. You need to decide what processes will make you most competitive. Then find technology that automates them.

Getting your staff members on board and motivated to share information is the key. Be sure to check out my blog, Sell, Sell, Sell! for plenty of tips and advice on getting the people part of contact management right.

About the Author

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