

ERP Course: Sales and Marketing

Reading: Chapter 4 from Mary Sumner

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Sales

Personal

- Driven by a seller
- Targets individuals directly without a prior request for services or products
- A special case is retail

Complex Sales

- Sometimes called Enterprise Sales as well
- Driven by a customer
- With request for a proposal and a bid stage and contract at the end
- State, government, services, software, consulting, and so on

Sales and Marketing Processes in the Large

Sales Lead Identification

Prospecting

Customer Need Identification

Proposal to a Customer

Closing/Contract

Deal Transaction

Marketing

Sales

Sales Lead Identification

To identify a potentially interested party to buy services or outcomes of the services

It usually comes from lead generation such as:

- Trade shows
- Direct marketing (usually comes with CRM/individualized)
- Advertising
- Internet Marketing
- Cold Calling

All connected with contact bases

Prospecting

Discarding unqualified leads from qualified to contact (just those who will with high probability buy products)

- Criteria for qualified leads
- Metrics
- Selection tools
- Clustering tools
- Personalization/scripting (criteria may differ from campaign to campaign)
- Different actions (appointments, sending a white paper, and so on)

Prospecting

Selecting contacts/leads based on:

- Budget availability
- Earlier closed transactions
- Payment history
- Strategic value
- Relationships with others

Support for lead types and customer kinds

Customer Need Identification

Several sessions to clarify customer requests

Identifying a gap between current state and future planned state

The gap implies a suggested solution

Sometimes this stage is called as Sales Opportunity in different stages

Closing

Differs from sales to sales and from business to business

Can be:

- Transfer of money
- Signature on a contract and transfer to another unit/department
- No sales possible

Not all sales opportunities close positively

Deal Transaction

After closing the sales process

Represent a complex exchange of money for a service and product

Can include configuration, training, development, manufacturing and so on

Longer period of time

Contact Management

New contact vs. Customers

Contacts histories

Contacts vs. Accounts

Contacts in relations to other contacts

Vertical vs. horizontal clustering into business areas and segments

Planned vs. done Activities

Channels of interaction for the contact

Telemarketing

Identification who is calling and to whom you call

Support for basic facts recording

Effective access to all information about contact – sales and payment history, interests, latest acquisitions, activities performed with the contact, ...

Reminders for next marketing events or calls

Direct Mail

Integration with main mailing tools

Generating mails for customers

Integration with product catalog

Integration with a reporting tool and information/document base

Generating task messages for a sales team member

Product

Information about product types

Product white papers and advertising materials

Pricing information

Discount strategies

Customer benefits programs

Configuration packages

Future product plans

Product features

Product sales history

Relations of products to customers

Sales at the Operational Level

Prospecting

Contact Management

Telemarketing

Direct Mail

Products

Management Control

Product Pricing

Sales Management

Advertising and Promotion

Sales Forecasting

Product Pricing

Customer Loyalty

Quantity

Customer program/configuration package chosen

Image based on price

Expenses connected with product

Price should

- Guarantee financial goal
- Fit the reality of marketplace
- Product positioning

Sales Management

Sales team members

Territories and their shape and clustering

Planning to do lists – calling, meetings, making scripts and so on

Lead selection programs

Products profitability

Evaluating

Comparison of the sales person productivity against average
(money, time, positively closed opportunities)

Most profitable products

Products and Customers which have the highest percentage of
sales

Weak products per territories

Sale person performance per product type

Promotion

Media selection

Which media channels are the most effective

Monitoring of them

Planning the campaigns and fairs

Planning and evaluating day to day marketing activities

How many campaigns lead to closed opportunities and revenues

Sales Forecasting

Segmenting potential customers

- By territory
- Products
- Services
- New products

Using past information and information about competition, customer demand and demographic trends

Sales

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File Edit View Tools Window Help

Sales & Marketing

- Sales
 - Contacts
 - Customers
 - Salespeople
 - Teams
 - To-dos
 - Opportunities
 - Production Schedule
 - Outlook Integration
 - Reports
 - Documents
 - Periodic Activities
 - Setup
 - Order Processing
 - Marketing
 - Inventory & Pricing
 - Analysis & Reporting
 - History
 - Setup

E000001 Kontorcentralen A/S - Contact Card

General Communication Segmentation Foreign Trade Commerce Portal

No. E000001 Search Name KONTORCENTRA...

Type Company Phone No.

Company No. E000001 Salesperson Code PS

Company Name Kontorcentralen A/S Salutation Code ÅRS

Name Kontorcentralen A/S Last Date Modified 25-10-04

Address Carl Blochs Gade 7 Date of Last Interaction 25-10-04

Address 2. Last Date Attempted 25-10-04

Post Code/City DK-2610 Rødovre Next To-do Date 23-01-01

Country Code DK

Question	Answer	Que...	Last Dat...
Rabat (%) sidste år	Lav rabatbrug		31-01-01
Firmaejerskab	Fondsbttrs		31-01-01
Antal ansatte	1-99		31-01-01
Debitorikøbsfrekvens, sidste år	> 5 gange om året		31-01-01
Debitorikøbsfrekvens, indevær...	> 5 gange om året		31-01-01
Omsætning (RV), sidste år	Lav (under 1.000)		31-01-01

Contact Functions Create Interact Help

AH Anne Grethe Hansen - Salesperson/Purchaser Card

General Invoicing Outlook Integration Notification Synchronization

Code AH

Name Anne Grethe Hansen

Job Title

Commission % 0,00

Phone No.

E-Mail.

Next To-do Date

Salesperson Functions Create Interact Help

Teams

Code	Name	Next
ADM	Administration	
CANVAS	Canvasteam	
MARKETING	Marketinggruppe	
SALG	Salg	23-
SERVICE	Service	
SUPPORT	Produktsupport	

Team Help

10000 Kontorcentralen A/S - Customer Card

General Communication Invoicing Payments Shipping Foreign Trade Commerce Portal

No. 10000 Search Name KONTORCENTRA...

Name Kontorcentralen A/S Balance (LCY) 1.441.125,53

Address Carl Blochs Gade 7 Credit Limit (LCY) 0,00

Address 2. Salesperson Code PS

Post Code/City DK-2610 Rødovre Responsibility Center RYDOVRE

Country Code DK Service Zone Code M

Phone No. Blocked

Primary Contact No. Last Date Modified 25-10-04

Contact: Hr. Anders Madsen

Customer Sales Help

No. of To-dos - To-dos

General Filters

Show as Lines Salesperson

Show No. of To-dos

No.	Name	25-01-01	26-01-01	27-01-01
HN	Hanne V. Nielsen			
MR	Morten Rasmussen			
PS	Philip Sjøborg			

1 7 31 3 12

25-01-01 FILTER

Production Forecast

General

Production Forecast N... 

Forecast Type 

Location Filter 

Date Filter

No.	Description	1999	2000	2001	2002	2003
▶ 1000	Cykel			2.300	2.300	2.300
1001	Turcykel			240	240	240
1100	Forhjul					
1110	Fælg					
1120	Eger					
1150	Fornav					
1151	Forhjulsaksel					
1155	Forlygteholder					
1160	Dæk					

1 7 31 3 12   

Functions 

Help

OP100054 Forøg indtjeningen fra salget - To-do Card



General Related Activities Recurring

No. OP100054

Description Forøg indtjeningen fra salget

Location Conference Room

Salesperson Code

No. of Attendees 2

Attendees Accepted No. 0

Contact No. (Multiple)

Contact Name.

Contact Company Name

Team Code SALG

Completed By

Status Not Started

Priority Normal

Type Meeting

All Day Event

Starting Date 24-01-01

Starting Time

Duration 1 day

Ending Date. 24-01-01

Ending Time. 0:00:00

Canceled

Closed

Date Closed.

To-do Functions Create To-do Help

1000 Cykel - Item Card

General Invoicing Replenishment Planning Foreign Trade Item Tracking E - Commerce Warehouse

No. 1000 Search Description . . . CYKEL

Description Cykel Inventory. 32

Base Unit of Measure . . . STK Qty. on Purch. Order . . 0

Bill of Materials Qty. on Prod. Order . . . 44

Shelf No. F4 Qty. on Component Lines . . 0

Automatic Ext. Texts . . . Qty. on Sales Order . . . 104

Created From Nonstoc... Qty. on Service Order . . 0

Item Category Code. . . Service Item Group . . .

Product Group Code. . . Blocked

Last Date Modified . . . 25-10-04

Item Sales Purchases Functions Help

Item 1000 - Sales Prices

General Options

Sales Type Filter. None Item No. Filter. 1000

Sales Code Filter Starting Date Filter . . .

	Sales Type	Sales Code	Item No.	Unit of M...	Minimum Qua...	Unit Price	Starting ...	Ending D...
*▶	Customer		1000		0,00	0,00		

Help

E000069 Dansk Møbelcenter - Contact Card

General Communication Segmentation Foreign Trade Commerce Portal

No. E000069 Search Name DANSK MØBELCE...

Type Company Phone No.

Company No. E000069 Salesperson Code MR

Company Name Dansk Møbelcenter Salutation Code ÅRS

Name Dansk Møbelcenter Last Date Modified 25-10-04

Address Classensgade 52 Date of Last Interaction

Address 2. Last Date Attempted

Post Code/City DK-2100 København Y Next To-do Date

Country Code DK

Question	Answer	Que...	Last Dat...
▶ Firmaejerskab	Fondsbørs		31-01-01
Antal ansatte	100-499		31-01-01

Contact Functions Create Interact Help

- List F5
- Related Contacts
- Company ▶
- Person ▶
- Mailing Groups
- Profiles
- Statistics F9
- Picture
- Comments
- Alternative Address ▶
- Interaction Log Entries Ctrl+F5
- Postponed Interactions
- To-dos
- Opportunities ▶
- Segments
- Sales Quotes
- Customer/Vendor/Bank Acc.
- Commerce Portal Roles

LE100025 Gæstestole til receptionen - Opportunity Card

General

No.	<input type="text" value="LE100025"/>		Campaign No.	<input type="text"/>	
Description	<input type="text" value="Gæstestole til receptionen"/>			Priority	<input type="text" value="Low"/>
Contact No.	<input type="text" value="E000004"/>		Sales Cycle Code	<input type="text" value="EKSI5-STOR"/>	
Contact Name.	<input type="text" value="Kvalitetsmøbler A/S"/>			Status	<input type="text" value="In Progress"/>
Contact Company Name .	<input type="text" value="Kvalitetsmøbler A/S"/>			Closed	<input type="checkbox"/>
Salesperson Code	<input type="text" value="HN"/>		Creation Date.	<input type="text" value="23-01-01"/>	
Sales Document Type . .	<input type="text"/>			Date Closed.	<input type="text"/>
Sales Document No. . . .	<input type="text"/>				

	A..	A..	Sales Cy...	Date of ...	Estimate...	Estimated Val...	Calcd. Curre...	Completed %	Chances of S...
▶	✓		1	25-01-01	01-02-01	10.000,00	40,00	2	20

KA1001 Forøg salg - Campaign Card

General Invoicing

No. KA1001

Description Forøg salg

Status Code 5-START

Starting Date 01-11-00

Ending Date 01-04-01

Salesperson Code HN

Last Date Modified

Activated

Campaign Functions Help

MG10001 Forøg salg - Segment

General Interaction Campaign

No. MG10001

Description Forøg salg

Salesperson Code HN

Date 25-01-01

No. of Lines 79

No. of Criteria Actions 2

Contact ...	C..	Contact Company Name	Contact Name	Description
▶ KT100202	H..	Afrifield Corporation	Janice Galvin	Forøg salg
E000025	H..	Antarcticopy		Forøg salg
E000062	H..	Autohaus Mielberg KG		Forøg salg
E000061	H..	Beef House		Forøg salg
KT100189	H..	Bilabankinn	Ragnar Eiriksson	Forøg salg

Segment Functions Log Print Help

No.	Name	...before	25-01-01 24-02-01	25-02-01 24-03-01	25-03-01 24-04-01	after...
10000	Kontorcentralen A/S					
	Sales (LCY)	146.093,55	0,00	0,00	0,00	0,00
	Profit (LCY)	45.124,55	0,00	0,00	0,00	0,00
	Profit %	30,9	0,0	0,0	0,0	0,0
	Inv. Discounts (LCY)	6.210,45	0,00	0,00	0,00	0,00
	Pmt. Discounts (LCY)	0,00	0,00	0,00	0,00	0,00
	Pmt. Disc Tol. (LCY)	0,00	0,00	0,00	0,00	0,00
	Pmt. Tolerances (LCY)	0,00	0,00	0,00	0,00	0,00
20000	Ravel Møbler					
	Sales (LCY)	55.469,45	0,00	0,00	0,00	0,00
	Profit (LCY)	21.004,45	0,00	0,00	0,00	0,00
	Profit %	37,9	0,0	0,0	0,0	0,0
	Inv. Discounts (LCY)	1.715,55	0,00	0,00	0,00	0,00
	Pmt. Discounts (LCY)	0,00	0,00	0,00	0,00	0,00
	Pmt. Disc Tol. (LCY)	0,00	0,00	0,00	0,00	0,00
	Pmt. Tolerances (LCY)	0,00	0,00	0,00	0,00	0,00
30000	Lauritzen Kontormøbler					
	Sales (LCY)	52.356,00	0,00	0,00	0,00	0,00
	Profit (LCY)	24.581,00	0,00	0,00	0,00	0,00
	Profit %	46,9	0,0	0,0	0,0	0,0
	Inv. Discounts (LCY)	0,00	0,00	0,00	0,00	0,00
	Pmt. Discounts (LCY)	0,00	0,00	0,00	0,00	0,00
	Pmt. Disc Tol. (LCY)	0,00	0,00	0,00	0,00	0,00
	Pmt. Tolerances (LCY)	0,00	0,00	0,00	0,00	0,00
40000	Kvalitetsmøbler A/S					
	Sales (LCY)	9.100,00	0,00	0,00	0,00	0,00
	Profit (LCY)	9.100,00	0,00	0,00	0,00	0,00

Salesperson - Sales Statistics

19. September 2006

Period:

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All amounts are in LCY

Code	Name	Sales (LCY)	Profit (LCY)	Profit %	Invoice Disc. Amount (LCY)	Payment Disc. Given (LCY)	Pmt. Tolerance (LCY)
JR	John Rasmussen	203.877,18	58.572,18	28,7	0,00	0,00	0,00
PS	Philip Sjøborg	497.346,00	180.653,00	36,3	7.926,00	0,00	0,00
Total		701.223,18	239.225,18	34,1	7.926,00	0,00	0,00

Sales Cycle - Analysis

CRONUS Danmark A/S

19. September 2006

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EKSIS Eksisterende kunde

Stage	Description	Activity Code	No. of Opportunities	Estimated Value (LCY)	Calcd. Current Value (LCY)	Average No. of Days
1	Indledende	INDLED	6	14.300,00	2.190,50	0
2	Præsentation	P-WORK	1	10.000,00	5.500,00	0
3	Tilbud	TILBUD	0	0,00	0,00	0
4	Underskriv kontrakt	USKRIV	0	0,00	0,00	0
Eksisterende kunde			7	24.300,00	7.690,50	0

EKSIS-STOR Eksisterende storkunde

Stage	Description	Activity Code	No. of Opportunities	Estimated Value (LCY)	Calcd. Current Value (LCY)	Average No. of Days
1	Indledende	INDLED	5	368.000,00	1.721,00	0
2	Kundeforståelsesmøde	BEHOV	0	0,00	0,00	0
3	Produktpræsentation/workshop	P-WORK	0	0,00	0,00	0
4	Tilbud	TILBUD	0	0,00	0,00	0
5	Underskriv kontrakt	USKRIV	0	0,00	0,00	0
Eksisterende storkunde			5	368.000,00	1.721,00	0

F#RST F#rstegangskunde

Stage	Description	Activity Code	No. of Opportunities	Estimated Value (LCY)	Calcd. Current Value (LCY)	Average No. of Days
1	Indledende	INDLED	3	8.400,00	1.036,50	0
2	Kvalifikation	KVAL	0	0,00	0,00	0
3	Præsentation	P-WORK	0	0,00	0,00	0
4	Tilbud	TILBUD	0	0,00	0,00	0
5	Underskriv kontrakt	USKRIV	0	0,00	0,00	0
F#rstegangskunde			3	8.400,00	1.036,50	0

F#RSTSTOR F#rstegangsstorkunde

Stage	Description	Activity Code	No. of Opportunities	Estimated Value (LCY)	Calcd. Current Value (LCY)	Average No. of Days
1	Indledende	INDLED	4	95.600,00	194,60	0
2	Kvalifikation	KVAL	1	3.000,00	75,00	0
3	Firmapresentation	V-PRÆ	0	0,00	0,00	0

Problem with Sales Orders Processing

Incorrect pricing and customer information

Delays in inventory updates, partial shipment

Delays in delivery

Incomplete invoices

Incorrect posting of payments

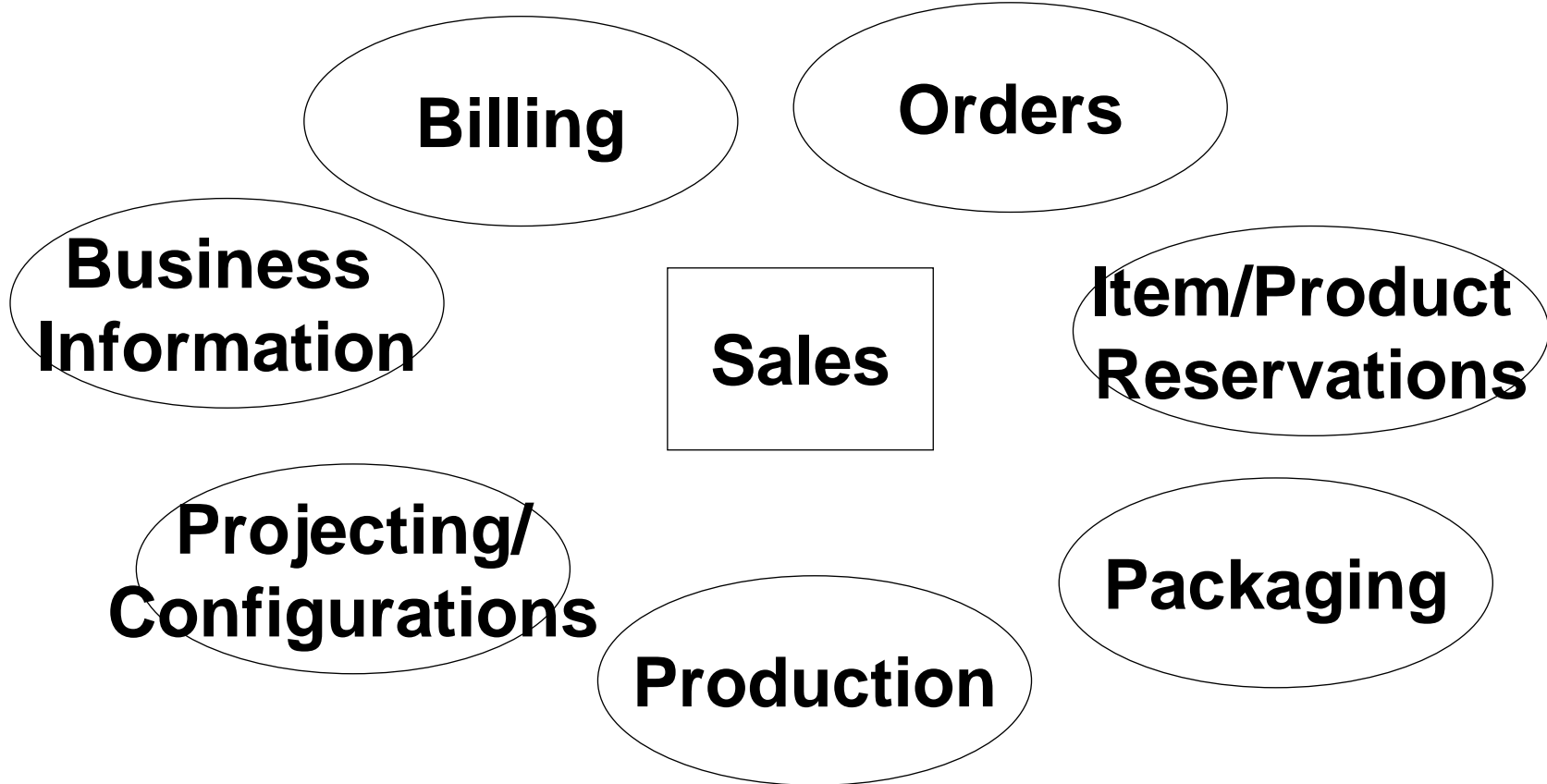
Delays in accounting (reminders to customers who have paid and so on)

Interaction with Other Modules

Business rules for:

- Correct customer information based on contact data and customer order/contract => Accounting module, Material Module
- Correct information on configuration items/services ordered/subscribed to => production
- Correct addresses and times to deliver => Production module, resource planning, warehouse module
- Customer, Product and Items, Financial Information, Right Units to be informed

Interaction of Sales and Other Modules



Advantages of Integrated Sales System

Standard codes for products and customers

Common database for all modules

Standard documents based on common templates (e.g. transactions numbers)

Audit trails (tracking the state of a business transaction)

Sales records integrated with accounting records

Marketing

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File Edit View Tools Window Help

Sales & Marketing

- Sales
- Order Processing
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 - Logged Segments
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- Setup
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- Analysis & Reporting
- History
- Setup

KA1001 Forøg salg - Campaign Card

General Invoicing

No. KA1001 Salesperson Code HN

Description Forøg salg Last Date Modified

Status Code 5-START Activated

Starting Date 01-11-00

Ending Date 01-04-01

Campaign Functions Help

No. of To-dos - To-dos

General Filters

Show as Lines Salesperson

Show No. of To-dos

No.	Name	21-01-01	22-01-01	23-01-01
HN	Hanne V. Nielsen			2
MR	Morten Rasmussen			
PS	Philip Sjøborg			

1 7 31 3 12

MG10001 Forøg salg - Segment

General Interaction Campaign

No. MG10001 Date 25-01-01

Description Forøg salg No. of Lines 79

Salesperson Code HN No. of Criteria Actions 2

Contact ...	C..	Contact Company Name	Contact Name	Description
KT100202	H..	Afrifield Corporation	Janice Galvin	Forøg salg
E000025	H..	Antarcticopy		Forøg salg
E000062	H..	Autohaus Mielberg KG		Forøg salg
E000061	H..	Beef House		Forøg salg
KT100189	H..	Bilabankinn	Ragnar Eiriksson	Forøg salg

Segment Functions Log Print Help

HN Hanne V. Nielsen - To-do List

Closed	Starting ...	T..	Description	P..	S..	Organize...	Date Clo...	Canceled	Comment	C
	22-01-01		Identifier nrtglepersoner	N..	I...	OP100020				K
	22-01-01		Identifier nrtglepersoner	N..	I...	OP100024				K