

BPM capabilities can guide sales people to more profitable activities

It is commonly accepted that CRM software helps sales reps meet their quotas and deliver great customer service. Let's face it, despite CRM's promise, it still has some shortcomings. By storing data in a structured manner, conventional CRM helps reps track activities and analyze patterns, but more is needed to increase sales and delight customers.

Information without action is worthless. Imagine a cookbook that only lists ingredients without explaining how to cook them. This is similar to the typical CRM package that stores data but gives no instructions. Just as cooking a dish requires exact execution, closing a deal needs a regulated sequence of actions.

“To help sales reps reach quota, you must arm them with a tool that guides their activities and supports every operation with actionable data,” says Katerina Kostereva, CEO and cofounder of BPMonline.

That is the power of CRM software that includes business process management (BPM) as a core capability. BPM functionality will help you boost sales by performing the following activities:

**Simplify sales tasks:** With BPM you can automate critical processes so the sales team doesn't have to think about them. A system that automatically prompts salespeople on their next activity will free up time for lucrative activities like generating quotes and meeting with prospects.

**Identify and liberate sales bottlenecks:** On paper you may have a robust sales pipeline, but how can you shorten the

sales cycle? A process-based CRM solution lets you constantly test different approaches to see what works best. This will enhance the sales process by exposing bottlenecks and inefficiencies that delay revenues. And you can replicate the processes of your most successful salespeople, applying them universally across your company.

**Team-up with other departments:** Sales reps may lose sales opportunities due to lack of communication among the marketing, sales, or finance departments. BPM lets you design and introduce processes that bring these departments into the loop at just the right time. As an example, finance should ping sales whenever a customer nears the end of its sales contract.

**Pursue continual improvement:** Process automation is good, but often the processes themselves need fixing. Gartner, for example, reports that 18 percent of companies say they need to change processes at least monthly. A BPM-based customer management solution helps you continually introduce and automate new processes. Look for software with drag-and-drop functionality for process design, rather than complex programming.

**Enhance communications internally:** Crisper and better defined processes that involve different departments are likely to enhance internal communications. Training, too, will be easier when you clarify the roles and processes for sales staff to follow.

**Customize workflow to your business:** Many CRM solutions force you to follow rules set down by the supplier. By introducing process-based BPM, you can design and optimize procedures that match your business model.

“Successful selling is not about luck or good fortune, it's about seizing and managing opportunities to achieve the desired outcome,” Kostereva says. “Once you get your processes right, the sales team and the entire company will win.”

### About BPMonline

BPMonline is a global company that offers world-class solutions for business automation. The heart of BPMonline CRM is a BPM engine that couples powerful tools for process design with automation and analysis. In 2012 BPMonline CRM was named CRM Idol 2011 in the EMEA region. The contest judges called BPMonline one of the most elegant process-based CRM applications, providing user-friendly customization at an inexpensive price point. BPMonline was also voted a Rising Star of 2012 by CRM magazine.

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