

How To Assess User Skills In Your Sales System?

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[Blog entry](#)

Do you know that the world's longest movie, according to Guinness World Records, is *The Cure for Insomnia*, directed by John Henry Timmis IV, released in 1987?

It runs for 87 bottom-achingly long hours. In this movie, poet L. D. Groban recites his 4,080-page poem *A Cure for Insomnia*.

Unfortunately, many sales systems used in IT companies cause the opposite in their would-be users.

Those systems are so packed with unnecessary features, that if users dared to digest the user manuals, they would fall either into deep sleep or deep coma.

In today's market, CRM (customer relationship management), (SFA) sales force automation, CMS (content management systems) and other key business software programmes are in the hands of some big companies that forcefully push their wares even onto those markets for whom these programmes are far too big, burdensome and overwhelming with pretty steep learning curves.

Have you seen small businesses struggle with Microsoft Project when there are tonnes of project management programmes better suited for the SMB market?

The same goes for Microsoft Visio. SMBs are much better off with SmartDraw.

If you run your projects in Microsoft Project, parallel with the project team, you need a project documentation team as well, solely dedicated to updating information in MS Project.

So, people sit down to learn the ins and outs of the software they're supposed to use on a daily basis, and quickly fall asleep on the slow and sluggish learning curve.

And when they wake up, they realise that they don't even need most of the features those software packages offer.

Some companies hire specialist trainers to teach their people how to use certain software, but a huge chunk of the training process focuses on some mysterious features people don't even use.

And by the end of the training, people get frustrated because they know that in order to learn the programme, they will fall behind on their normal work.

And when they fall behind on their normal work, they are in deep trouble at their next performance evaluation¹.

Do you know which one of which software user is a beginner, intermediate, advanced or expert user?

Software companies know that if they push their wares at the end of the year, purchasing agents are eager to blow their budgets on anything in order not to lose it. So, this is the time to up-sell buyers on features that they don't ever need.

So, as a result of sellers' upsell attempts, purchasing agents up-buy, and often end up buying

¹ Performance evaluation is something that should never take place. Read more about it in *Abolishing Performance Appraisals Why They Backfire and What to Do Instead* by Tom Coens, Mary Jenkins. ISBN: 9781576750766

software that is way beyond their companies' true requirements.

Don't ask me why a five-person IT consulting firm needs a full-blown shopping cart on its website, because I don't know the answer. All I know is that I've seen far too many of those lunacies.

Those firm leaders may know that no one buys consulting services through shopping carts, but they still buy them because sellers had managed to convince them to buy.

But whatever you've bought, you've got it, so the best thing you can do is to assess your people's skills on your software and then you can plan their skill development according to their current knowledge.

So, I'd like to offer you the following checklist to assess how effectively your people can operate your sales system.

After all, you can have the best sales system, but if your people can't use it to the fullest, then the system becomes pretty useless.

So, let's see what we have here...

Level 1: Beginner User Skills

These are some of the most foundational tasks your people need to know and be able to use in your sales system.

1. Setting up a new account, its type, source, industry and other key characteristics of the account.
2. Creating contacts and attaching them to specific accounts, adding conversation notes, scheduling calls and meetings and sending emails to those contacts.
3. Changing passwords.
4. Conducting searches in the systems based on various criteria.
5. Editing accounts and contacts and saving the changes.
6. Sorting accounts and contacts according to various criteria (date of acquisition, date of last change, ascending and descending order, etc.)
7. Ordering accounts and contacts based on various criteria.
8. Being able to send emails to yourself, either with or without attachment(s), and then they are visible both in your Inbox and "Sent" folder.

Level 2: Intermediate User Skills

Here is a list of intermediate tasks that have to be performed on a sales system.

1. Creating opportunities, setting up probabilities, commencement and completion dates and assigning follow-up processes.
2. Looking at opportunities both in forecast view and in the quarterly/annual tab.

3. Assigning accounts to other users.
4. Opening accounts and contacts and editing them in view mode.
5. Customising the dashboard's layout.
6. Grouping accounts by priority.
7. Being able to send a test template-based email and change the template if needed.
8. Being able to back up the whole system and export files to other systems.
9. Being able to upload documents to the database and rename them if needed.

Level 3: Advanced User Skills

And this is a list of tasks advanced users are expected to carry out.

1. Being able to import a list of accounts and contacts from Excel spreadsheets.
2. Being able to set the type, source, industry, etc. for mass-imported records.
3. Being able to check accounts for correctness: Assigned to a person, next steps, consistency of notes, conversations, emails and documents.
4. Being able to compare two users in terms of number of managed accounts, progress in accounts and general effectiveness?
5. Being able to generate a broad range of both internal progress reports and client reports.
6. Being able to create various email templates. Sending test emails based on that template and changing the template if needed.

Level 3: Expert User Skills

All these skills become expert level skills when users become terribly experienced at performing the above tasks.

For instance, generating a report, without much thinking and hesitation, on a specific product and sold by a specific salesperson in specific time frame. Now that's expert level usage.

And the best way of attaining expert level is a combination of application and teaching others.

Methodologies Vs. Principles

The problem is that most job ads are looking for people with methodology experience as opposed to principle experience.

A job ad may call for "knowing how to use Infusionsoft" as opposed to "understanding the principles of email marketing".

It's like wanting to hire someone who can use Adobe Photoshop but has no understanding of the principles of graphics arts.

Job ads to hire workers always call for skills. Infusionsoft, Photoshop, Wordpress, etc.

Career ads to recruit talents always call for principles. Email marketing, graphics arts, online presence, etc.

The difference between skills and principles is that even a monkey can learn the former, but it takes years of study and application to learn the latter.

Case in point: Just because I know how to cut as a butcher, it doesn't make me a surgeon.

Yes, both butchers and surgeons cut things for a living, but there is a "slight" difference.

And that "slight" difference lies in understanding the principles of either of the two professions.

You can't replace an artisan butcher with a meat processing plant labourer just because they both can use a knife.

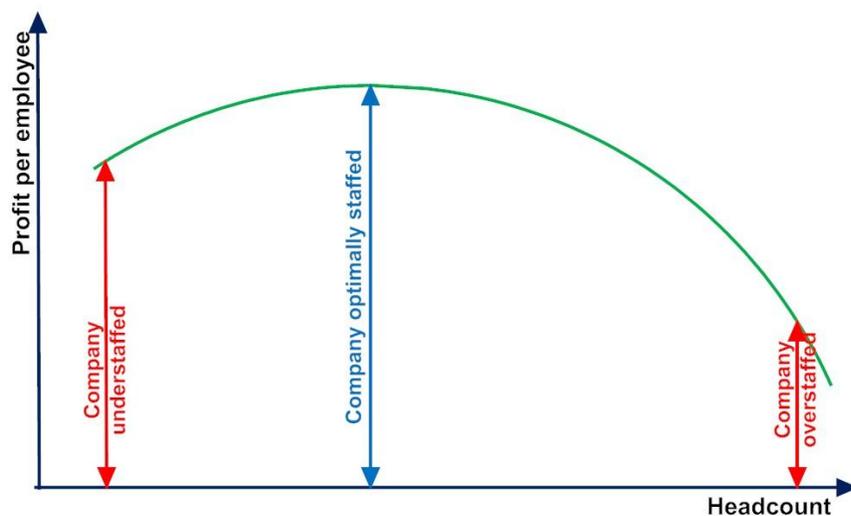
So, for instance, if your email marketing programme is based on Infusionsoft, are you going to hire someone who knows how to use Infusionsoft or someone who's never used it but understands email marketing inside out?

Yes, an Infusionsoft user doesn't cost much because, as a skilled labourer, she's a dime a dozen type commodity.

But a skilled email marketer is a different ballgame. Understanding the principles of email marketing, she can learn the required skills to use Infusionsoft pretty quickly.

And this distinction leads us to the...

Economies Of Scale In Staffing



When it comes to staffing, your business can be understaffed, optimally staffed and overstaffed.

Productivity (a.k.a. profit per employee) requires the optimal number of people in your business. If your business is either understaffed or overstaffed, productivity suffers.

Let's look at an example of a restaurant, and let's imagine that the number of tables represent the people who provide the service.

Under-utilised restaurant: 1 table with 1-3 people => 1-3 people per table

Well-utilised restaurant: 1 table with 4 people => 4 people per table

Over-utilised restaurant: 2 tables with 6 people => 3 people per table

3 tables with 8 people => 2.6 people per table

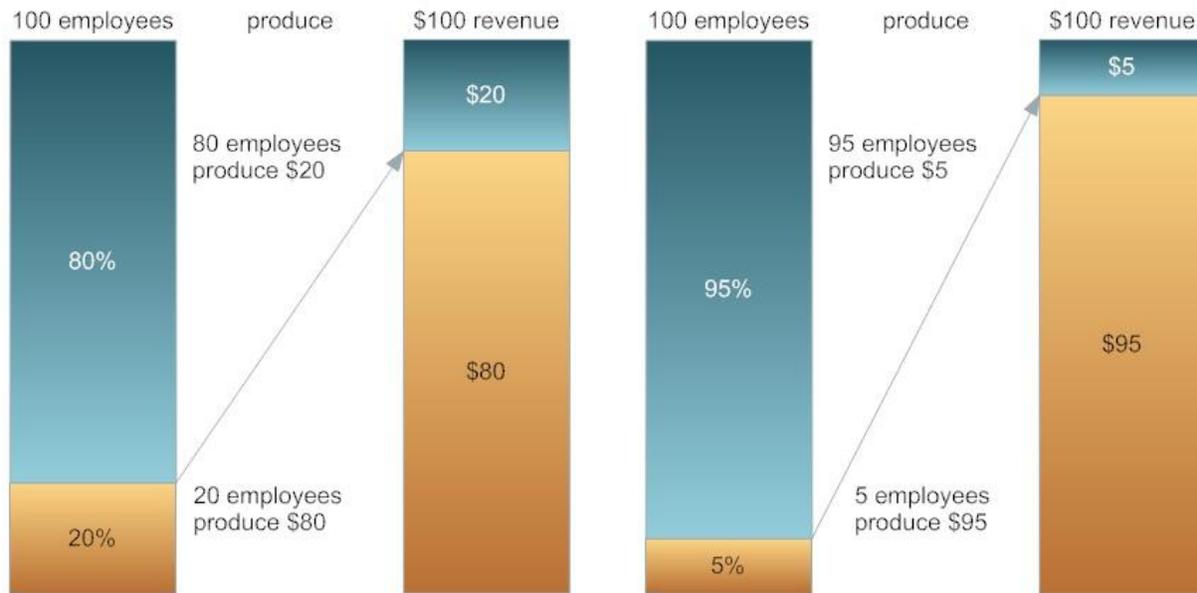
Seriously over-utilised: Four tables with 10 people => 2.5 people per table.

In your business, you have to find the optimum ratio of associates, prospects and clients. You have to figure out how much human effort your prospects, clients, suppliers and other people outside your business needs, and you have to tailor human capacity inside your business.

And here you've already had or you'll sooner or later have a dilemma.

Should you employ more people at lower pay or fewer people with higher pay?

Pareto says that 20% of your people do 80% of the work.



The 80/20 rule worked well in the industrial age.

That is...

Producers produce $80 / 20 = \$4$ per person

Slackers produce $20 / 80 = \$0.25$ per person

Producers out-produce slackers 16-fold.

The 80/20 rule for the knowledge age is around 95/5.

That is...

Producers produce $95 / 5 = \$19$ per person

Slackers produce $5 / 95 = \$0.05$ per person

Producers out-produce slackers 380-fold.

So do you think a Producer has to be paid 16-times more than a Slacker?

If you are willing to pay 20-35% more than the industry average and create a truly enjoyable work environment, soon you end up with the best people in your industry.

In closing here is a bit of research on what good employees are looking for in their work...

Sadly most managers and business owners erroneously believe that employees only care about pay and job security. Well, they don't.

Here is an interesting comparison about what business owners or managers believe employees are seeking, and what employees are actually seeking.

For instance, managers believe² that “Full Appreciation for Work Done” is only at 8th place on employees importance list. Well, it’s number 1. Managers believe money is the number 1 criteria for employees. No, it’s only No. 5.

Factors	Managers	Employees
Full appreciation for work done	8	1
Good wages	1	5
Good working conditions	4	9
Interesting work	5	6
Job security	2	4
Promotion/growth opportunities	3	7
Personal loyalty to workers	6	8
Feeling "in" on things	10	2
Sympathetic help on personal problems	9	3
Tactful disciplining	7	10

The reality is today’s businesses use sophisticated processes and systems in their operations, and they require sophisticated people.

Hiring minimum-wage people may look tempting on the surface, but also think about what sort of hopeless, hapless and toothless junkies, boozers and losers your offer would attract.

That could make it really hard to achieve anything significant in business, would you agree?

In the meantime, don’t sell harder. Market smarter and your business will be better off for it.

[With victory on high...](#)



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² **Sources:** Foreman Facts, Labor Relations Institute of NY (1946); Lawrence Lindahl, Personnel Magazine (1949), Repeated with similar results: Ken Kovach (1980); Valerie Wilson, Achievers International (1988); Bob Nelson, Blanchard Training & Development (1991); Sheryl & Don Grimme, GHR Training Solutions (1997-2001). Note the glaring discrepancy between manager opinion and employee fact.

Additional Knowledge Products to Build Your IT Business

Here are some knowledge products on business development for building your premium-calibre IT business. It's especially for privately held "entrepreneurial" IT companies and solo IT professionals.

These products are sort of workbooks. They explain what is what, then walk you through the "how to..." part of the process. As you read the books, you do the exercises, and by the time you finish reading, all the relevant bits and bobs are in front of you on paper applied to your own unique situation. For this reason, the materials are not long but rather dense.

I hope you find them valuable.

Winning Yellow Pages Advertising For Information Technology Companies: One piece of good news is that most people who look you up in Yellow Pages are serious buyers. Another piece of good news is that some 97% of Yellow Pages ads are like eunuchs in a harem. They are physically there but are unable to perform.

The bad news is that your Yellow Pages ads might look like your competitors' ads. But that's great recognition and you can now correct this error.

Some people say, no one uses the Yellow Pages any more. Normally not. But in case of emergency (server down or computer crash), people look up the Yellow Pages and phone the company that is best differentiated from the masses. And remember that emergency work has very very high perceived value. So, take a moment and look at your ads. [Winning Yellow Pages Advertising For Information Technology Companies](#)

Perfect IT Client Profile Development Toolkit: We all know the high financial and psychological cost of low quality clients. They pay little but demand a lot. Even when they are happy, they are reluctant to give testimonials and introduce us to their connections. So, it's pretty important to carefully cherry-pick clients and to make sure they come from the top 0.5-2% of the Perfect Client Pyramid.

Yes, these top-drawer companies are hard to "conquer", but in the long-run, they offer the highest return on your marketing investment. But before contacting them, you have to define them in your business. And this is what this knowledge product does. [Perfect IT Client Profile Development Toolkit](#)