Eight collaborative strategies to help you win customers, increase sales and achieve marketing success
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Eight collaboration strategies
Experience shows that when sales or marketing teams collaborate dynamically, the impact on the bottom line can be dramatic.

If you’re in a senior sales or marketing role, you know how hard it is to win customers and deliver a profit in a ferociously competitive climate.

There are a lot of worried people out there, all trying to meet their targets and turn a profit in these difficult times. The fact is, the old ‘surefire’ ways of winning business no longer seem so sure.

Organizations have never had to work so hard to satisfy their customers and stay ahead of the competition. Every time your company launches a new promotion, a competitor retaliates with an even better offer. You squeeze your margins and cut costs to the bone, but as soon as your rivals follow suit, your hard won advantage disappears. Every year, it seems you need to be quicker, smarter, more flexible, more creative – just to stay in business.

Today’s sales and marketing managers need to find new sources of competitive advantage. This guide reveals the collaborative strategies that will be key to achieving your sales or marketing goals. To illustrate this, we have selected eight practical examples of how simple but innovative collaboration strategies could help your organization drive sales, accelerate lead generation and improve overall financial performance.

You may ask why we decided to write a guide that focuses on collaboration as opposed to more established sales and marketing disciplines. Put simply, it’s because our own experience tells us that when sales or marketing teams collaborate dynamically, the impact on the bottom line can be dramatic.

Collaborative sales and marketing is not about creating some kind of idealized, touchy-feely organization. Instead, this guide provides a number of simple measures you can adopt to overcome key sales and marketing challenges – even in the most unforgiving business climate.
Lift the lid on the average company, and you will probably encounter a number of all too familiar problems.

The sales team complains they spend more time on paper work and admin, or working out how to use the latest sales software, than actually closing deals. In theory they’re supposed to spend 90% of their time selling to customers; in practice they waste hours travelling to meetings. Meanwhile, the sales director can see those challenging Q4 targets slipping ever further out of reach.

The marketing function has its own problems. The company needs to manage product brands across multiple territories, but it’s a real nightmare trying to coordinate activities involving personnel in a dozen different countries. Plus there's the issue of how to produce campaigns that will deliver measurable results, often on a shoestring budget.

If you asked these people whether sales and marketing share information effectively, you would probably be laughed out of the room. In theory sales and marketing are two sides of the same coin; in practice, however, the two camps rarely work as a team. Even between departmental heads, communication is infrequent at best. On the ground floor, the workforce complains they are kept in the dark about key decisions affecting their roles.

There is a common theme behind these and countless other inefficiencies in the sales and marketing operation. Put simply, today's sales and marketing professionals lack the tools they need to collaborate effectively in a distributed organization.

This is bad news for you as an employee, as it reduces your effectiveness and ability to realize your full potential. But it's also bad news for business as a whole. We all know the importance of teamwork in achieving sales and marketing goals – yet in most companies the barriers to effective collaboration are becoming greater every day. This in turn is having a hugely damaging effect on productivity, on innovation, and ultimately on profits.
The way it could be

"We need to rethink the way our sales and marketing teams operate. In the wake of globalization, sales and marketing teams have become dispersed."
Web collaboration – delivering team profit

Let’s move beyond the limitations of the office-based culture, and think about the kind of environment that would help sales and marketing people excel in their roles.

More than anything else, success comes down to the ability to assemble, train, motivate and support the best teams in the business. Web collaboration is absolutely essential to achieving this goal.

What do we mean when we talk about Web collaboration? Essentially, Web collaboration enables dispersed teams to meet, discuss issues and generally interact just as they would if they were sitting around the same table. The key difference, however, is that the Internet offers the ability do this faster and more cost effectively, at any time and from anywhere in the world.

Key areas where a strategy for dynamic teaming can make a difference

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<th>Sales</th>
<th>Marketing</th>
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<td>Increase selling time, reduce ‘deadtime’</td>
<td>Deliver and manage global brands</td>
<td>Enable online collaboration to reduce process costs</td>
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<td>Communicate sales targets and strategy</td>
<td>Reduce time to market from concept to launch</td>
<td>Support flexible working models suited to distributed organizations</td>
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<td>Develop time-efficient, high quality sales training</td>
<td>Create opportunities for greater interaction with customers</td>
<td>Harness collective talent and skills</td>
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<td>Shorten the sales cycle</td>
<td>Develop cost-effective ways to reach more customers and develop leads</td>
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<td>Manage and motivate widely dispersed teams</td>
<td>Plan and implement integrated, multi-channel campaigns</td>
<td>Increase visibility in new markets</td>
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<td>Maximize cross selling/upselling opportunities with existing customers</td>
<td>Track customer experience and measure marketing effectiveness</td>
<td>Understand customers requirements</td>
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<td>Add value during the sales process (build a picture that doesn’t compete on price alone)</td>
<td>Obtain maximum value from your marketing spend</td>
<td>Gain competitive advantage through enterprise-wide collaboration</td>
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<td>Build more rewarding channel relationships</td>
<td>Gain greater channel exposure and promotion</td>
<td>Build stronger alliances and channel links</td>
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So much for the basics, but the most advanced Web collaboration solutions go a step further. For example, organizations can now host live sales and marketing meetings where global teams can talk, negotiate, share presentations and applications, all in a real-time, online environment. The result is less time and money wasted on travel, and more time spent being productive.

The latest generation of Web collaboration tools enable your company to schedule online conferences involving hundreds of prospects at a fraction of the time and cost of a traditional conference. Virtual classrooms can also be used to deliver regular team training, as well as updates on new tactics, products and promotions, without the disruption associated with traditional classroom training.

Companies can also exploit knowledge-sharing tools to quickly create and publish multimedia sales and marketing tools on the Web. Any sales and marketing professional using just a PC and a browser can then access these tools.

Web collaboration offers huge advantages within the organization – but it becomes even more valuable when you extend it to your customers and business partners. Imagine being able to collaborate with channel partners on new product launches or promotions, or share ideas and concepts with agencies and suppliers in a real-time environment. Equally, think how the ability to interact and build relationships with thousands of customers – quickly, conveniently and cost-effectively – could impact your bottom line.

As you can see from reading the Team Strategy illustrations in this guide, the potential applications for this kind of technology are huge and varied. In fact, many of Centra’s customers are already using Web collaboration to enhance their sales and marketing performance and achieve a decisive competitive advantage.
Web Collaboration – the benefits for sales professionals

Five ways to improve your sales performance:

**Shorten the sales cycle.** Web collaboration tools can transform your traditional sales calls into convenient, mutually rewarding interactions with customers and prospects. Using Centra, sales representatives can conduct product demonstrations online, demonstrate ROI, share content and presentations, negotiate deals, and interact with other key players – all without leaving the office.

**Collaborate to win pitches and proposals.** In a competitive situation, the ability to collaborate effectively on contract bids and client pitches can make the difference between winning and losing a major deal. Centra enables sales and bid teams to collaborate on proposals, share market intelligence, and develop professional, well-researched propositions faster than the competition.

**Better equip your sales force.** Online sales meetings and training sessions can help you keep your sales force highly trained and informed about the latest developments, opportunities and competitive threats. Since sales representatives can log onto meetings even while in the field, they are free to spend more of their time closing deals.

**More effective sales channels.** Building channel loyalty is always a challenge. How much mind share is the channel giving you? Frequent communication and continuous access to product experts and sales resources builds channel loyalty and increases their success in selling your products.

**Build customer relationships.** Developing sales opportunities with existing customers is the key to rapid revenue generation. Regular Web presentations, remote consultations, and online product training are all powerful ways to accelerate your next sales opportunity within existing accounts.
Web Collaboration – the benefits for marketing professionals

Five ways to increase your marketing effectiveness:

**Rapid lead generation.** Interactive Web events provide a powerful yet cost-effective way to reach new prospects on a global basis. Today’s rich media Web events enable you to offer your customers and prospects rewarding, entertaining experience, without the inconvenience and expense of travelling to a physical venue. This is one reason why return on investment for online events is typically much higher than for traditional face-to-face events.

**Turn prospects into buyers faster.** By using Web collaboration tools to educate your prospects and the market, you can accelerate the process of converting interest in your products into real desire to make a purchase. Online seminars involving industry experts and reference customers enable you to develop compelling propositions in your key markets.

**Get users more involved.** Use the Web to conduct virtual user conferences and training sessions. These events can put users in touch with each other, allowing them to share ideas, interact with your key executives on future strategies, and learn about new products in a way that builds customer loyalty and accelerates use of your products.

**Reach a wider audience, more often.** Web events allow you to reach audiences – big and small – with greater frequency. Marketing professionals can use Web collaboration tools to interact with industry influencers such as press and analysts, large internal audiences, or to put customers and partners in touch with each other.

**Enhance customer care and development.** Demonstrating your ongoing commitment to customer success is a powerful way to build customer loyalty. Web collaboration enables you to accelerate product and service upgrades with timely, personalized online demonstrations and training, and integrate those events with marketing programs such as executive briefings.
Collaboration Strategies

The following stories are designed to illustrate a range of the collaborative strategies and applications that can help organizations attain their key sales and marketing objectives.

Team Strategy 1:
Bank uses Web seminars to build market share

Victoria is responsible for growing Smart Bank’s small business share. She’d tried some of the usual tools like leaflets and direct mail, but nothing seemed to work. She needed something that would differentiate Smart Bank as the company that offers the most value, innovation and support to the small business sector.

Having recently participated in one of Centra’s online marketing events, Victoria wondered whether a similar approach might work for her. She knew conferences could be a powerful way to attract new prospects, but an expensive traditional event was not viable. By contrast, a Web seminar offered a cost effective way for Smart Bank to generate leads and make a mark as an innovator in the small business banking sector.

Setting up the Web seminar was easy. Victoria found a well-respected business expert to give a flagship presentation on Migration to Electronic Banking. The event was then promoted through a marketing campaign specifically targeted at small business clients.

Using Centra software, Victoria built the seminars in weeks for a fraction of the cost of traditional conferences. The first seminar she ran attracted 400 small business managers – well over target.

Small business customers can now log onto Smart Bank’s seminars without travelling to physical venues. During these events, customers can participate in live presentations, and have their say with numerous interactive polls and surveys. They can also access a number of small business guides, or view previous recorded seminars at their leisure.

As for Victoria, she has dramatically accelerated her lead generation activities and passed hundreds of strong leads to her colleagues. Web seminars provided a cost effective way for Smart Bank to reach a wider audience, and Victoria’s team can now track, measure and pursue valuable customer leads with speed and efficiency.

Conclusion: Online marketing events provide a powerful, cost-effective way to accelerate lead generation and measure your return on marketing investments.
Collaboration Strategies

Team Strategy 2:
CPG company launches new global brand

KissCurls Inc was about to launch Eve, a range of organic hair beauty products aimed at low income, environmentally conscious consumers.

Everything now depended on KissCurls' ability to execute a successful product launch in multiple countries. Knowing a global launch can easily become a logistical nightmare, KissCurls implemented Centra to enable faster, more efficient collaboration between key personnel working around the world.

Two months before the launch date, KissCurls ran an online seminar presenting the brand strategy to every marketing and product manager in all the key countries. As a result, KissCurls was able to communicate detailed launch plans to hundreds of employees in a single hit – a process that would have required dozens of time consuming meetings in the past.

KissCurls' collaborative launch strategy did not stop there, however. KissCurls' marketing managers used e-meetings to brief PR and advertising agencies in many countries, and provide feedback on creative concepts. This alone ensured that the Eve line was ready to launch with a global yet locally tailored advertising campaign well ahead of schedule.

KissCurls also conducted regular online consultations with key retail partners to help streamline Eve's introduction into the major supermarket chains. Several times a week, KissCurls' country managers were able to report on progress and discuss problems in a live, interactive environment. These online meetings proved vital to ensure that KissCurls maintained a focused, coordinated approach across all elements of the product launch.

Conclusion: Web collaboration can help companies coordinate complex, global product launches and accelerate time to market.
Team Strategy 3: Global bid team wins high value contract

EFS was bidding for a major contract to provide technology services to the UK’s Ministry of Defense. With such a high value deal at stake, the company needed to assemble a world-class team capable of winning the bid against stiff competition.

The project required expertise and support from EFS consultants based in many different countries, as well as the involvement of several key business partners. Initially, however, this distributed team struggled to make progress against demanding deadlines. Telephone conferences proved unproductive, and important proposals and documents were delayed as the team had to circulate each new revision via email.

With time ticking away, EFS decided a radical approach was required. Web collaboration software was implemented to enable team members to meet and interact in a live environment, using standard PCs and browser technology.

The pace of progress changed almost overnight. The project leader could now schedule live interactive meetings within a matter of minutes. During these meetings, every member of the team could discuss tactics, provide feedback, and share applications and documents in real-time. The solution also enabled the team to access documented research much more effectively.

Web collaboration allowed the bid team to develop new ideas much faster, and a compelling proposition quickly began to take shape. The ability to collaborate on proposals in real-time also cut the review cycle for key documents from days to hours.

EFS’s consultants worked closely with the company’s key business partners to build a complete solution that would address all the client’s needs. Web collaboration enabled each member of this extended team to contribute their specialized knowledge, without any unnecessary delays. As a result, EFS was able to deliver a winning response to tender, well in advance of the Ministry of Defense’s deadline.

Conclusion: Web collaboration enables client-facing teams and business partners to interact more effectively, helping them to develop more compelling customer propositions and pitches.
Collaboration Strategies

Team Strategy 4:
Pensions advisors clinch sales with online consultations

Let's face it, it's hard to get consumers interested in complex financial products. A lot of people also feel uncomfortable about inviting a sales representative into their home.

Merchant Associates, a company of Independent Financial Advisors, found an innovative way around this problem by offering free customer consultations over the Web. Instead of sending advisors out to people's homes, customers can now discuss their financial plans for retirement in a live, online environment.

The beauty of the solution is that Merchant's advisors can offer the same personal, one-to-one service without having to travel to as many meetings. Using Centra collaboration software, advisors can chat with customers in real time. They can visually illustrate a product's past performance, and dynamically generate pension fund projections right in front of the customer's eyes. The advisors can also talk the customers through on-screen documents, which can be downloaded for closer inspection at a later date.

The new sales model offers a win-win situation for the company and its customers alike. Many of Merchant's customers find it more convenient and less intrusive to meet sales representatives in this way. At the same time, the productivity of Merchant's consultants has radically improved. The company is now reaching a wider market, and translating a much higher proportion of prospects into satisfied customers.

Conclusion: The ability to demonstrate a product's capabilities and performance over the Web can be decisive in many sales situations.
Team Strategy 5:
Confectionary company runs online focus group

Changing the packaging of an old-time favorite chocolate bar is a risky but sometimes necessary business. For years one of Swirl Confectionary's most popular chocolate bars went by different names in different countries - but the time had come to create one easily manageable international brand.

Several new names were developed, along with new packaging options that were designed to take the brand forward while preserving some of the old product's traditional look and feel. Swirl needed to test the new names, packaging options and marketing strategy in key markets to ensure consumers would respond positively to the new brand.

The traditional approach was to test the product in consumer focus groups, but this would be a costly and time consuming exercise to run in multiple countries. So instead, Swirl used Web collaboration software to run an online focus group with a representative mix of international consumers.

The focus group was able to view different names, then vote for their preferred brand with a click of a button. Different packaging options were also shown using streaming video. Throughout the process, a facilitator was able to provide guidance and answer questions in real time.

The online focus group was a much faster, more cost effective way to test consumer reactions to different brand options than traditional methods. The research gathered in these trials enabled Swirl to deliver the new brand into the market much more quickly. Known as MilkoBite, the newly branded chocolate bar is now one of the highest selling snack products in North America.

Conclusion: Online focus groups provide quick, cost effective ways to market research new products and brands.
Team Strategy 6:
Phone retailer revolutionizes its sales force training

Dial.Me.Up is one of the world’s leading mobile phone retailers, with a reputation for offering friendly, knowledgeable advice to help consumers find the right package to suit their needs.

Of course, maintaining this high level of service throughout 400 branches is no easy task. Dial.Me.Up needs to update its 3000 sales representatives about new product features, taxes and promotional packages on a weekly basis. In the past they relied on training bulletins combined with less regular classroom training – but this was far from ideal. More recently, the company has implemented a Web-based solution to provide more flexible, cost effective online training.

Dial.Me.Up’s e-Learning solution makes it easy to create and distribute high quality training content. Now sales representatives spend an hour every week updating their knowledge on the latest product lines. To do this, they simply access recorded training sessions using a PC in the staff room. During these sessions, they can view product demonstrations, watch colleagues role-play typical sales situations, and test their knowledge using interactive questionnaires.

Sales representatives also participate in monthly interactive workshops where they can interact with tutors and colleagues, ask questions, and collaborate on a variety of training exercises.

The company’s online training program has resulted in improved sales figures and an industry award for high quality customer service. At the same time, the disruption and costs associated with traditional classroom training have been almost eliminated – all of which has helped Dial.Me.Up deliver another set of impressive financial results.

Conclusion: Web-based training offers all the benefits of classroom training, but at a fraction of the cost.
Team Strategy 7: e-Meetings help medical specialist reverse sales decline

When Peter Kinsey took the role of Medical Sales Director for a specialist vendor of medical supplies, he knew he faced an uphill struggle. Sales were falling, morale was low. Out of a team of 100 medical sales representatives, eight of his best performers were already threatening to leave.

The sales reps spent most of their time on the road demonstrating medical products to doctors. Years of poor management and inadequate support had left them feeling isolated, and sales inevitably suffered as a result.

Peter wanted to initiate regular sales meetings to help set clear team objectives and foster a go-getting culture. But bringing 100 people together in one place at the same time was so difficult that meetings were regularly postponed or abandoned.

The solution was to run a weekly sales meeting online. Centra e-meeting now allows the sales reps to attend meetings using their laptops from any location, with minimal disruption to their busy schedules. At each meeting, Peter gives an update on progress, asks the week's top performers to share sales successes, and informs his team about the latest opportunities and threats.

The impact on morale and the company's sales performance has already been impressive. Employees know exactly what their targets are, and what they need to do to achieve them. In fact, the new sales meetings have been so successful, the company now plans to hold online conferences enabling its sales and marketing teams to exchange valuable customer intelligence and develop complementary strategies. These kinds of collaborative initiatives have restored the company's fortunes and put it back on the path to growth.

**Conclusion:** Online meetings can improve team management and motivation, while enabling more productive collaboration between different functions and departments.
Team Strategy 8:
The Call Center Company makes the most of CRM

The Call Center Company recently made a multi-million dollar investment in a well-known customer relationship management (CRM) solution. This complex software promises to revolutionize the way the company’s outbound sales teams and customer support function interacts with the customer. Trouble is, no one seems to know how to use it.

In a last ditch attempt to recoup their investment, the company organized ‘CRM KickStart’, a training and support program to help employees make the most of the new technology. Given the time pressures of a Call Center environment, this program had to be delivered in a highly flexible, cost effective and non-disruptive manner.

The company had already used Centra for management training in the past, and decided to see if a similar Web-based approach would help now. Using Centra, they were able to develop a multi-phased training program that could be delivered over the Web to any of the company’s global call centers.

Product experts were able to talk sales and customer support teams through each of the key steps in using the new CRM application, and answer questions in a live environment. Later on, the employees were able to review recordings of the sessions to reinforce key lessons. The company also used Centra as part of its CRM helpdesk. Now if employees experience a problem with the CRM application, the helpdesk technician can resolve their issues in a live interactive session.

As a result of the online training program, the CRM solution is being used correctly and on a daily basis by nearly all the company’s employees. Productivity is on the rise, and the latest survey on customer satisfaction is very positive indeed. At last, The Call Center Company is beginning to realize real value from its CRM solution.

Conclusion: Online training and support can help employees adopt new processes and technology quickly and with minimum disruption.
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