The Full Contact Selling Methodology is about the Digital Transformation of B2B Sales. Enabling B2B Companies to build a multi-channel engagement program designed to better influence, manage and communicate with your business ecosystem. This is achieved by creating the integration of people, process, CRM and related social technologies.
“Ecosystem” conveys the idea that all the pieces of an economy come together in particular places, and that their strength and interactions determine prosperity and economic growth. Think of it as your garden, where you need fertile soil, seeds, and other ingredients to make things grow.

Planning for CRM Success!

Your Business Ecosystem

• Customers
• Prospects
• Channel Partners
• Supply Chain
• Contractors
• Vendors
• Influencers

Digital Transformation

Stakeholders

• C-Level Management
• CEO, CIO, CMO, CFO
• Sales & Marketing
• Customer Service
• Field Service
• Professional Service
• Supply Chain & Operations
• Product/Category Management
• Human Resources
• Information Technology
Digital Transformation - the People

- C Level Management
  - Growth, Profitability & ROI
  - Budgeting and Planning
  - Reporting
  - Competitive threats
  - Operation efficiencies
  - Resource & asset management
  - Company valuation
  - Satisfying the Board

Marketing Teams
- Impact of Technology & Social Media
- Marketing Campaigns
- Customer Loyalty
- Content & Brand Presence
- Budgeting and Planning
- Hiring, Training and Managing People
- Report Generation
- Satisfying the C Executives

Sales Teams:
- Generating revenues
- Customer retention
- Territory coverage
- Channel management
- Competitive threats
- Report generation
- Hiring, training and managing people
- Satisfying the CEO
Digital Transformation - the People
Field Service Teams
• Mobility
• Dispatching, scheduling, invoicing
• Revenue generation
• Customer satisfaction
• Portal self service
• Response times
• Hiring, training and managing people
• Core metrics & reporting
• Satisfying the C Level Execs

The Digital Transformation of “The Buying Process”

The Buying Process has Changed

57% of the buying journey is done BEFORE a sales rep is involved.
75% of B2B buyers now use social media to research vendors.
90% of decision makers say they never respond to cold outreach.
74% of buyers choose the rep that was FIRST to add value and insight.
7 people are now involved in the average B2B buying decision.

Source: LinkedIn Sales Solutions
The Digital Transformation of Sales

Customers are choosing to delay commercial conversations with suppliers.

67% Complete

Customers Due Diligence Begins

Customer’s First Serious Engagement with Sales

Purchase

Degree of Progress Through the Purchase Process Before Engaging Sales Customer Average

The Digital Evolution in B2B Marketing © 2012

The Corporate Executive Board Company.

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1. CFO - With CEO/COO, will generally make decision to lease or buy the equipment and release, or allocate, funds

2. Department Head - After approval from administration

3. Director, Materials Management - Will designate a buyer to create a PO and submit to manufacturer or designated distributor

4. Equipment Specialist - person with familiarity with the equipment in question and its particular delivery and operational requirements

5. Facilities Management, Environmental Services, Biomedical Department, Safety and Security persons aware of the various delivery and installation factors that would impact their respective

6. Nursing - person affected by the complexity of the piece of equipment as well as potential interference with work flow and patient schedules

7. Designated Receiver - This would be someone acting as the agent for the hospital to take responsibility for signing off on the delivery, and

Hospital Associates

White Paper / The Ultimate Cheat Sheet On Purchasing New Hospital Equipment

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The Traditional Buyer (Non-Digital)
- Research and product evaluation consisted of:
  - Vendors
  - Networks
  - Trade shows
  - Exhibitions
  - Associations
  - Decision-making consisted of:
    - Engages many suppliers early in the B2B process
    - Face-to-face presentations
    - Lunches
    - Consumed period information
    - Brochures
    - Case studies
    - Ask for references
    - Many vendors proposing proposals
    - Look for budget approval
    - Wants to sign on the dotted line

The Modern Buyer (Digital)
- Research and education consisted of:
  - Web-based research
  - Social platforms
  - Vendors
  - Networks
  - E-commerce/Reviews
  - Associations/Plan Communities
  - Decision-making consisted of:
    - Engages a handful of suppliers late in the process
    - Online presentations
    - Consumes digital information
    - Brochures
    - Case studies/examples
    - Already talked to your customers
    - Sheriffs vendors proposing proposals
    - Digital signature

EXHIBIT 1 | Digital Matters—Even for Offline Purchases

Did you make your purchase online or offline?
Was your purchase decision significantly influenced by digital research?

<table>
<thead>
<tr>
<th></th>
<th>Industrial Machinery</th>
<th>Industrial Supplies</th>
<th>Packing and Shipping</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offline</td>
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<td>34</td>
<td>98</td>
<td>232</td>
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<tr>
<td>Online</td>
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<td>68</td>
<td>42</td>
<td>168</td>
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<tr>
<td>Digitally Influenced</td>
<td>98</td>
<td>54</td>
<td>54</td>
<td>206</td>
</tr>
</tbody>
</table>

On average, two-thirds of purchases were significantly influenced by digital.

Source: BCG research.

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Nonetheless, most B2B buying journeys still end the traditional way: in a store or involving direct interaction with a sales team. Our survey revealed that some 58% of industrial-machinery purchases were significantly influenced by online activity, even though 100% of the purchases were made offline. For industrial supplies, 88% of buyers performed some form of online research prior to purchase, while 31% of their purchases took place offline.

For industrial supplies, 88% of buyers performed some form of online research prior to purchase, while 69% of their purchases took place online.
The B2B Buying Process – The Digital Buyer

The B2B Buying Process – Part One – Initial Requirements

The B2B Buying Process – Part Two – Information Gathering

- Requirements
- Resources
- Budget
- Timeline

Initial Budget
Approvals
Requirements
Resources
Budget
Timeline

The B2B Buying Process – Part Four – Making the Purchase

- Engage Vendors
- RFP
- Select Purchase
- Consultant
- Dealer
- Vendor

The B2B Buying Process – The Digital Researcher

Think with Google

2012
2014

- 29% 35-44
- 27% 18-34
- 22% 35-44
- 26% 45-54
- 46% 18-34
- 19% 45-54
- 18% 55+
- 13% 55+
Step One - Initial Planning

Assembling your Management Sponsorship Team
- C Level Executives
- LOB Management
- Sales
- Marketing
- Project Service
- Customer Service
- Field Service
- Supply Chain
- Information Systems
- Finance
- HR

The Digital Transformation and Discovery Workshop
Bring together the key stakeholders in order to
- Bringing a big picture approach and perspective
- Building organizational buy-in and financial support
- Discuss any project impact on business processes and culture
- Understand the project's high level vision, scope
Step One - Initial Planning

The Digital Transformation and Discovery Workshop
- Overview of CRM modules
- Managing your business ecosystem
  - People, process, technology
- Open discussion on departmental CRM challenges and high level objectives
- Value to the Business Stakeholders – WIFM, ROI
- High Level Roadmap

Step Two - CRM Review

CRM Project Team
- Project Manager
- Infrastructure/Data Architect
- Business Analyst/CRM Architect
- CRM Customizer/Programmer
- Business CRM Administrator
- Trainer
- Support Lead
- CRM Consultant/Partner
Step Two - CRM Review

- Resourcing – CRM Pilot Team
  - Cross Section of Users (SFA Examples)
    - Field Reps: Business
    - Inside Reps
    - Sales Administrators
    - Management
- Looking for people who:
  - Open to change
  - Embrace technology
  - Budget the time

Separate questionnaires for each business function
- Sales Team
- Sales Management
- Sales Admin
- Marketing
- Channel Manager
- Interviews
  - Discuss sales productivity
  - Walk-through business processes
  - Observe current use of technology
- Data Management
  - Spreadsheets
  - Email
  - Business Cards

CRM Roadmap
Step Three - Design

CRM Planning - Design

Process Re-engineering and Mapping
- Customer Buying
- Social Selling
- LinkedIn
- New Business Development
- Account Management
- Partner Relationship Management

CRM Planning - Design

Allows the business user to get involved with:
- Business alignment & change management
- Project ROI and budgeting
- Technology requirements
- Software
- Customizations
- User experience
Step Three - Design

- Complete Your Project Plan
- Complete Requirements Documentation
- Entity & user interface design
- Process & workflow definitions
- Data Plan
  - Model & Integration
  - Define users & security
  - Sources
  - Integrations
  - Merge & Purge

Step Four - Build

- Quick start programs typically fail
- Work with an experienced CRM professional
  - Make sure they are certified
  - Ask to see a sample project plan
  - Understand resource requirements
- Look for industry and vertical add-ons
- Build a pilot/test system
**Step Four - Build**

- **Suggestions for Data**
  - Clean up the data before you put it in the CRM systems.
  - Start with the accounting data.
  - Buy good data for prospecting.
  - Add the departmental data.

- The users will not use the system if:
  - No data in the system.
  - Bad data in the system.
  - Wrong data.

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**Step Five - Roll-out**

- Test the system usability.
- Hardware components including laptops, mobile devices, printers – remote and local.
- Test and run all software applications:
  - CRM.
  - Outlook components loaded.
  - Workflows.
  - Office applications.
  - Mobility.
- Test data and synchronization.
Step Five – Roll-out

- Project Success = Training Success
- Use experience trainers
- All User must attend training
- Administrator Training
  - Sales Reps and Management
    - Process – day in the life
    - Technology
  - Technical Training
    - Supporting the application
    - Ongoing development

Benefits and ROI of Training
- Drastically improves user adoption
- Better quality of data is generated
- Less of a decline in productivity
- Immediate feedback on
  - Usability of the system
  - Problem areas in the system
  - Problem areas in user ability
- Training builds team spirit!

CRM Administration Training Requirements
- First line training, coaching and support
- How to be the CRM watchdog
  - Data quality
  - User compliance
  - Day to day user support
  - Onboarding and training new users
  - Ongoing customizations and BI
  - Workflows
  - ISV management
  - Marketing campaigns
  - New functionality
Step Five – Roll-out

- CRM End-user Training Requirements
- Training is mandatory for all users - set expectations
- Training is not a one-time event – plan to succeed
- Train by department – make it real
- Initial training should be live – eliminate distractions
- Leverage webinars and videos – pre and post
- Promote your champions and coaches

Step Five – Roll-out

- CRM Technical Training Requirements
  - Hardware and application support and troubleshooting
  - Programming and Customizations
  - Advanced BI and reporting
  - ISV Add-ons
  - Integrations
  - Upgrades and Future Planning

Step Six – User Adoption

- Plan for User Adoption program to last 6-12 weeks
  - Watch the data and system usage
  - Communicate with users - surveys
  - Weekly webinars and Q&A
  - Coach the Slow Adopters
  - Create training support materials
  - Videos – YouTube channel
  - Build a Culture of CRM
    - Become the CRM evangelist
    - Survey users
    - Identify Champions
    - Reinforce management commitment
Step Six – User Adoption

Building A CRM Culture
• CRM is Forever – Evangelize
• Project ownership needs to be from the Line of Business
• Start small but keep growing
• Good Data, Good Training, Good Coaching
• Great CRM Leadership

Initial Planning
Review
Design
Build
Roll Out

People
Process
Technology
User Adoption

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