Case Study

Linking sales to reps when there is no obvious answer

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Introduction

Lanshore is a reseller, implementer and managed service provider of sales performance management solutions.

Issue

Customer sales rep tracks sale and closes deal in CRM. This deal then gets opened as a contract in the financial services software. There is no inherent link between the CRM and the Financial software causing a gap between who sold something and when it starts to get delivered and worked, including final contract price.

Given that Lanshore has had multiple customers that have this issue this write up will encompass two distinctly different approaches in the resolution. This also points out a gap in data interchange and linking that many small to medium businesses have in the new world of SAAS software.

General Write up of project

Existing solution: Most cases the existing solution has several manual steps along with spreadsheets developed by sql download reports from the existing CRM and Finance applications.

In several cases a sophisticated spreadsheet with lookup tables and manual logic determine the end sate person who should be credited with the sale.

Lanshore worked with the customer, educating them on the new commission system. The customer was then able to, with the help of Lanshore, make plan changes and validate the changes. In this cooperation, the customer has successfully learned the system and reduced overall cost.

Problem

The way in which CRM sales and wbs/product contracts are linked is manually intensive and lacks audit capability.

Resolutions

In almost all cases workflow is created that allows the association of the contract to the rep. The workflow product of software was configured to allow the sales reps access to the contract.

Reps will then claim the contract and allow the managers to verify that they indeed belong to the contract. Once this process of verification happens, the rep is then associated to the contract and allows for a commissionable action to take place.

The association is saved into the commission tool so that the actions and reporting can take place directly in that tool.

Alternative Resolutions

Much like the above resolution, workflow is often seen as the best option. In case 2, workflow is used to do the association of the sale from the CRM to the contracts.

From there the commissionable event is loaded into the CRM(or in some cases a BI Warehouse) to show the link and then imported to commission application for processing.

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