

Navigate Staff through Effective Sales Conversations



A CLEVVA Construction Case Study

The background

A large national wooden door, window and skirting manufacturer distributes over 10 000 product variations. The sales channels include online sales, direct sales, as well as sales via national retail chains.

The challenge

The key challenges that the business faces include:

The three sales channels (website, direct sales and retail stores) offer varying levels of product information and support. This impacts the overall brand experience and customer perception.

Sales staff struggle to learn all the technical details of the products on offer so they focus only on the products they are familiar with, tending to target clients who ask for these standard or 'remembered' products.

It takes up to 12 months for a new sales person to be able to operate fully on their own because there is so much they need to learn about the industry, the products and the technical aspects of window frames, door frames, doors and accessories.

Staff struggle to physically carry the huge range of product samples into meetings in large, cumbersome sample bags – and the cost of these samples is significant.

Clients find it difficult to differentiate between competitive products, mainly because very few people can effectively explain the technical differentiators. This results in price and colour being the main drivers of most buying decisions.

Sales teams have little sight of what is available for delivery, and end up simply taking paper-based orders and then having to contact clients back to let them know their request cannot be fulfilled.

Retail sales staff do not work for the manufacturer, and therefore lack the motivation to learn and understand the technical differentiators of the products. This results in retail customers making price driven decisions that impact sales volumes.

The requirement

The management team was looking for a solution that would deliver on the following key requirements:

- ^ All sales staff, including retail sales staff, able to conduct a detailed need analysis per client, highlighting key facts that should influence their final decision (beyond price and colour)
- ^ All sales staff able to recommend relevant products, linked to identified needs
- ^ Improved cross sales
- ^ Improved management of work flow once an order has been captured
- ^ Improvement in sales call reporting
- ^ Improvement in client satisfaction ratings
- ∨ Reduction in the time it takes to get a new sales rep performing effectively



The solution

To ensure that a consistent sales experience is offered across all three channels, a small internally trained team built a Sales Navigator that identifies the relevant product(s) lined to every client need, as well as highlighting relevant cross sale products. All sales brochures, presentations and product technical data sheets are also made available at the relevant time. Any resulting actions based on customer choices are also triggered off the Sales Navigator, and tracked against the assigned person to ensure the loop is closed.

This Sales Navigator was also integrated into the company's enterprise planning system to ensure all sales advice leveraged up to date customer data, as well as product and stock data.

Sales staff, via their Sales Navigator, could therefore be guided through every sales activity knowing that every step and decision is tracked against the client and the activity itself. This allowed that sales staff to focus more of their efforts on the client, and less on whether they are asking the right questions, offering the right products, or following the right sales procedures. Sales Navigator ensured they always did.

The planned second phase is to now allow clients to access the Sales Navigator via the web, so they can receive intelligent online product advice and not simply access to more product information.

The results

1. **Sales staff are able to grow their individual sales by increasing their cross-sale ratios** and to broaden their client base due to new product offerings.
2. **Sales reps are no longer required to be product experts in order to sell effectively.** The key determining factors of success are their ability to service their clients and to act as trusted advisors – using CLEVVA as their just-in-time support platform.
3. **The Sales Director can see exactly what every sales and support person is doing and, via GPS tagging, where they were doing it.**
4. **Sales activities can effectively be work-flowed** using CLEVVA's sharing and assigning features.
5. Key clients can obtain online support, both to **place orders and to resolve technical queries in real time.** The business is also exploring ways to use CLEVVA to power in-store kiosks for customer self service.

The benefits

CLEVVA has enabled the business to hire sales staff with no prior industry experience, with the confidence that the desired customer experience will be consistently delivered across the national footprint. No matter who makes the sales call, customer will be asked the same questions, offered the same answers, and provided with the same experience. And with the future deployment of customer self service, CLEVVA has fundamentally changed the business's ability to expand its footprint across new markets and territories.

