



The Top Seven Mistakes when trying to improve sales quotes and orders

1. Giving your workforce the wrong tools

It is amazing how many managers think that they can streamline their systems and processes themselves. They create new, often-complex directives, processes, homegrown trackers or spreadsheets based on what has worked for them in the past. There's a major difference between a personal productivity tool, and one that will support a professional organisation.

Spreadsheets are hard to maintain companywide, plus once in circulation the chance of sensitive information (e.g. margins) being disclosed elsewhere is far higher than when using a secure database.

TIP: Invest in a system designed specifically for organisational use. Off-the-shelf packages exist for most sales processes, and can be customised. They'll last longer, work better and give added security.

2. Sacrificing accuracy of orders for speed of quoting

When a sales team is disconnected from product design, supply chain, finance, etc. it is commonplace for short-term priorities to take over. It's natural for salespeople to not sweat the details upfront, get a quick quote to the customer and hope someone fixes any problems downstream when the order comes in.

The problem is that downstream automated systems like ERPs are inflexible and they rely on a quality order. In the best case an inaccurate order will be rejected before delivery. Worst case, the customer receives the wrong product or service. This all costs time and money, customer goodwill and in some cases even the deal itself.

TIP: You don't have to settle for a trade-off. A well designed Configure, Price & Quote (CPQ) system allows speed AND accuracy of orders.

3. Trying to automate your current processes

Any organisation's systems and processes can date – even the best designed. Products evolve, markets shift and even sales techniques change, e.g. the emergence of social media, especially Linked-In, as a sales tool. If you are just trying to automate yesterday's processes you are putting your salesforce in the evolutionary slow lane.

TIP: Look carefully before implementing changes. Analyse sales processes and/or systems - both inside and outside your organisation. Look to the future and benchmark against competitors, to ensure you are keeping up with current best practice.

4. Thinking change is too costly

You know you have a problem; your customers and salespeople are telling you; communication isn't smooth, orders are getting lost and



there's too much complexity in your business. However when you start to look at what to fix you find a mass of interlinked problems and you have no idea where to start. There are so many things that need investment, how to justify the price-tag? You don't want be the one who instigates an ill-fated improvement project that overruns on time and budget, and then fails to deliver.

TIP: Fight the fear and implement changes sooner than later - you'll lose out to new and more agile competitors if you don't. Identify your key metrics and business drivers, and measure them before and after a project. Disciplined planning and execution will yield benefits quicker and more efficiently.

5. Giving salespeople far too much to do

This is the opposite to mistake number 2, where improving the sales quoting process morphs into fixing the entire end-to-end process.

Suddenly, your scope has widened and your salespeople are collecting data to support every downstream process.

While theoretically this makes for a perfect flow and smooth operation

later on, in practice it can make the quoting process unwieldy, administration-heavy and slow; just the issue you set out to overcome.

TIP: Think about whether your sales people are the most cost-effective way of capturing data, and when is the best time to capture these details. Make it as late in the sales process as possible and work backwards from there.

6. Trying to focus on too many things at once

Part-way through your improvement project you found the urge to change tack and added a second project into the mix. The impetus can come from a different department wanting to make improvements in a different way, or maybe things have changed and your original project just won't deliver the planned benefits any more.

You can end up fire-fighting and the result is a mess - confusing for customers, disheartening for the project teams and a killer for sales.

TIP: Design your projects for speed of implementation; i.e in weeks rather than years or even months. Plan for quick wins, build momentum, learn and adjust from each chunk of progress as you go.

7. Trying to fix problems in a heavy-handed fashion

You know it is taking too much time and effort for salespeople to generate effective quotes, because it's a constant moan, along with gripes about commission and the expenses policy. It's just another excuse for underperformance, and distraction from real selling.

You might even have scolded the team; "Don't let any system stand between you and the customers...", "Focus on the things you can affect, not those that you can't...", "Just bring in the business. We'll worry about processing it later." But you know your systems are disabling, not enabling sales.

TIP: Any team can have process problems and technology problems and people problems. Fix the first two and you can free up your sales managers to coach and drive the team.



I'm Andy Pieroux, Director of The Walpole Partnership. We typically work with clients who have 30-300 salespeople. We help our clients be more competitive by getting accurate quotes to their customers faster and, having sold more, we help them process their orders more efficiently.

Our team has over 65 years combined experience of implementing software to help clients configure, price and quote their deals perfectly and we're accredited to work with the leading vendors in the industry.

If you want to talk to us about improving your sales quote and order processes give me a call on 07974 149362 or drop an email to info@walpolepartnership.com and one of our team will get back to you.