

An Executive Briefing

**Linking Sales Performance & Technology  
To Create Competitive Advantage**

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## **I. Introduction**

Most corporations are experiencing intense pressure for financial performance and growth in the face of worldwide competition. Even companies which currently enjoy a major share of market, recognize that they must constantly strive to improve in order to maintain that position. Using techniques and programs such as reengineering, total quality management, empowerment, right sizing, productivity, etc. many organizations have made substantial improvements in their cost performance, but improvement in profitability and growth are strategic issues associated with competitive advantage.

The majority of this effort has been applied in areas outside of Sales. The pattern of placing sales as a lower priority within most programs reflects the complexity and fluidity of the function. However, several factors suggest that this prioritization is no longer appropriate or indeed an affordable luxury.

1. Sales and marketing typically account for 35% of total corporate costs.
2. Sales and other customer interfaces can represent a unique source of added value.
3. Complexity of the market demands decentralized decision making
4. Currently available technologies support tighter integration of resources.

The opportunity to leverage this potential is too great to subordinate to a low priority, thereby not gaining the economic and competitive benefits, or worse yet, to allow your competition to assume the technological and operational advantage.

Recognizing that field sales people need more effective tools and communication options, systems development organizations started to create software to run on small computer devices such as notebook size computers. This work has spawned an industry which is dedicated to the support of mobile professionals. The development and support of these systems typically requires multi-million dollar investments, and senior corporate management must prioritize this investment against other operational needs.

As the systems technology has grown more robust, our organization has recognized the opportunity to expand the impact of sales support systems and has developed the corresponding methodology to leverage this investment. The intent of this document is to present the need for and impact of this approach. The discussion will start by linking the sales function to the broader issue of competitiveness and describe how sales and the corporation at-large can have a positive effect on your customer base. We will then describe our methodology and provide practical examples of how clients have benefited from this approach. It is our hope that this framework and background will be helpful to you as you grapple with the operational priorities of your organization.

## **II. Competitive Trends and the Relevance of Sales**

Most of the pressures associated with today's global marketplace can be translated into four basic corporate strategic capabilities:

1. Cost competitiveness
2. Quality
3. Flexibility
4. Compression of Cycle Time

Obviously, market leadership in all of these areas is not the sole domain of sales. However, the following perspective supports the concept that the sales function is the logical starting place for enhancing corporate performance in all of the competitive areas listed above:

### **1. Cost Competitiveness**

Published estimates place the cost of sales and marketing to be 35% of total corporate cost.

- Most companies continue to use a simple output versus input model to evaluate sales performance despite the blurring of sales/marketing functions and the need to consider product or program profitability. The reality is that sales management must operate as general managers and sales reps must be empowered to make sound on-site decisions to close business and shorten sales cycles. Storage Technologies reduced their sales cycle by 25% by enabling their sales people to quote on-site.
- Turnover within the sales force has the triple impact of diluting sales management time, lost sales, and development costs of the new rep. Nalco Chemical estimates the cost of turnover at \$20 million. Some turnover is probably inevitable, but retaining high quality people is the key to competitiveness in the 90's.
- It is common for face-to-face selling time to be less than 25% of total time. Ciba Geigy has reported that each 1% increase in face-to-face selling time is worth an incremental \$6.7 MM in revenue.
- Sales management typically relies on gut level decisions regarding key resource issues such as deployment. A recent survey conducted by *Sales & Marketing Management* magazine reported that eight out of ten companies have an imbalance of alignment which costs 2-7% in lost sales every year.

### **2. Quality**

Total quality programs have been prominent within corporate America since the 80's but few programs have embraced sales, yet consider the following:

- Despite significant investment in resources, programs, improvements, and positioning, a client's view of the corporation is either reinforced or questioned by the behavior and knowledge of the sales person.
- Few people are in touch with the customer base more than sales, yet how effectively is sales linked to product/program/policy decisions or planning?
- Setting customer expectations is the primary domain of sales.
- Few lead generation systems are subject to any quality-related audits, yet in many industries this is a major factor in overall responsiveness and performance.
- In a study conducted by a major manufacturer, 80% of the poor quality costs incurred in manufacturing were attributed to causes outside of manufacturing. Of these causes, the predominant source was associated with errors in the order process. Further, it was found that every 1% reduction in failure cost equated to 4% in operating margin. Thus, sales and related support functions can have a dramatic impact on product cost.

### **3. Time Compression and Responsiveness**

- Responsiveness to competitive activity can save a product line. A major consumer goods was alerted via their competitive activity reporting system that an off-shore competitor was test marketing a new product concept in a number of markets. Marketing and local sales management devised a plan to dilute the impact of this new product thereby delaying the competitor's decision to rollout and providing time to leapfrog the competitor's innovation and save the market. This strategy was possible by monitoring the market, flexibility of response, and empowerment.
- Though time compression and responsiveness are key competitive corporate capabilities most organizations do not effectively tap into the direct customer interfaces which their sales people have developed. On the flip side of this issue, corporations often want their sales people to interface with the senior level management of their customers but do not support this strategy with relevant information or bog the rep down in fire fighting.
- In many organizations, the sales process is not well defined much less the issue of gathering market related data and making it available to the corporation at large. Although care should be exercised to avoid reporting overload, key information must be captured to reflect the attitude of the market.
- Decentralization of decision making reduces turnaround time and is a key element of empowerment. Owens Corning Insulation division's commitment to decentralization increased span of control by a factor of two while increasing both sales and market share.

### **III. A Holistic View of Sales**

As demonstrated in the previous section, the sales function has the potential to positively impact all of the basic performance criteria required to be successful in the marketplace. This section will expand on the discussion by developing an integrated perspective regarding the customer-sales-corporate interface.

The sales function is often viewed as an implementor of plans and programs. Consistent with this view, the evaluation of sales performance is done on the basis of productivity, i.e., \$ revenue generated versus \$ cost expended. This concept has carried over to efforts to "automate" sales by providing portable computer devices, software applications, and communication capabilities. Thus, most of these installations are targeted at efficiency issues and deal with increasing available time for selling or eliminating re-keying of data. Improvements in these areas undoubtedly have impact on cost and productivity, but they lack impact on the basis of competitiveness.

A more useful perspective regarding sales and the corporation as a whole is competitive advantage. Research on companies which establish and maintain competitive advantage indicate that they are characterized by superior market share, earnings, and provide superior value to the customer. The term "value" is useful in that it reflects real world trade-offs between cost and other considerations. Value also reinforces the need to know the customer and understand their framework for evaluating your organization as a vendor.

Value relates to effectiveness rather than efficiency; thus, it challenges the choice of resources as well as the methodology. Though the areas of emphasis will vary by industry, the components of value can be described as follows:

#### **1. Cost/Quality**

The concept of value means that cost is viewed by the customer as a relative cost. Relative value implies that in addition to per unit price, the customer is imputing costs internal to their organization including risk, flexibility, and insight. For the purposes of this discussion, cost and quality must be considered together because quality has a positive impact on cost and for many business processes, quality starts with the sales organization. Examples of how the sales function can impact relative cost are outlined below:

- Set correct expectations with the customer. This implies selling value and promising what can be delivered. The customer views the sales person as reliable and both organizations avoid the cost of interrupted schedules and related inventory safety stocks.
- Assist the customer with product, order, and program choices. The sales person is viewed as a partner as opposed to a vendor. The customer relies on the sales person for advice, reference, and results which improve their performance.

- Provide proper sales coverage (resource and frequency) and support. Appropriate market segmentation and sales resource deployment ensures meeting customer needs in the most cost effective way. Optimization in this area can be equivalent to increasing overall production yield by 1-2%.
- Ensure error free orders and follow-up (reduces customer admin. and trouble-shooting). Quality performance in this area can reduce staff, free up management, optimize production schedules and reduce inventory levels for the producer and the customer.

## **2. Information**

Providing information to the customer can cover a wide range of topics. Though the specifics vary by industry, it is undeniable that customers want sales reps who are knowledgeable about products **and the customer's industry**. The decision by IBM to deploy their sales people by industry reflects this expectation and need. Customers want sales people who can help them to be more efficient and competitive.

## **3. Responsiveness of Cycle Times**

Customers want to do business with organizations which respond quickly to their needs and in general are easy to do business with. Responsiveness is a key attribute of ease of business, and corresponds to processes which can be referred to as "customer fulfillment processes". Examples of these processes include:

- Design and quotation generators
- Just in time training
- Sophisticated customer briefing
- Proposal generation
- Price deviation approval
- Order turnaround time
- Confirmation of product availability
- Confirmation of delivery date
- Responsiveness to inquiries
- New or specialized product development
- Responsiveness to technical or literature requests
- Order status information
- Credit approval or approval of terms

In summary, the holistic view of sales is really the customer's view of the organization. The focus is on how the sales organization can deliver exceptional service and value to the customer by leveraging its own resources and the resources of the corporation at large. The challenge is to deliver that superior value at a cost which results in superior earnings. The next section will outline the elements of such a methodology.

## **IV. Tapping Into The Potential**

The holistic view of the sales function emphasized the delivery of high quality and responsive customer fulfillment processes. Within this model, corporate resources and technology are viewed as the enablers to achieve this desired performance both efficiently and effectively. Though this may at first appear to be an overwhelmingly complex task, when the elements of the analysis are arranged in the correct sequence, the process becomes one of following basic management practices:

### **1. Vision for the Business and Systems Technology**

The first task is to articulate a vision of where the corporation wants to be at some future date. This description will normally include topics such as image in the marketplace and various operational/market related goals. Critical success factors and initiatives are also common elements of such a document.

Since systems technology will provide an enabling capacity to achieve the business vision, this document should include a description of how current technologies will be migrated to support future operational needs. This information will address broad standards, policies and technology platforms as they are envisioned today.

### **2. Document Current Capabilities and Processes**

Interview techniques are used to identify current processes, management techniques, training, policies, and the resulting level of costs and performance.

### **3. Gap Analysis**

Defines the areas of discontinuity between the vision and current capabilities.

### **4. Process Redesign**

The methodology for process analysis starts with the same business processes which were defined as "customer fulfillment" in the previous section. The analysis challenges all assumptions regarding current procedures and seeks to achieve significant improvement in terms of quality, cost, turnaround time, and manual content. The result of this analysis is faster completion of each cycle and at a lower cost (the value equation).

### **5. Bridging Strategy and Tactics: The Needs Assessment**

Having completed the analysis, a game plan must be established which will maximize results in the short term and be "doable" in that time frame. The Needs Assessment

Document provides a summary of the analysis and establishes the rationale for the scope of work recommended. Given top management approval of this set of recommendations and rationale, work is continued on a prototype of the enabling systems which will support the field sales resources.

## **6. Implementation Plans and Cost Justification**

Having approved the scope and rationale for the project, project cost estimates must be made along with time lines. These reports provide a description of what capabilities will be made available in what time frame. The timing of events provides a basis for estimating corporate impact in terms of costs and benefits. Thus, these documents provide the detail to submit the project for funding/budgeting. Since the prototype is available in this same time frame, the tools to sell the system are in place.

## **7. Pilot Development**

Success of sales support systems is largely dependent on the attitudes of the field sales people. For this reason, the development process includes focus meetings to ensure that the approach is logical and intuitive from the end user perspective. A pilot operation is scheduled prior to releasing the system to the entire sales force. The pilot approach allows complete field testing and evaluation and serves as a basis for refining the training and support approaches.

## **8. Pilot Operation**

A pilot is typically scheduled for 1 - 3 months. Benchmarking of results is often included to ensure that performance criteria can be reached. The application systems are modified, if necessary, to reflect feedback from the pilot participants.

## **9. Rollout**

The system is fully deployed. If it is a large system, the deployment is often done in phases to better manage the logistics of training and to make the learning time manageable.

## **10. Post Rollout Expansion**

Over the life of a system, new capabilities may be added to leverage the hardware investment.

## **V. Success Stories Associated With This Methodology**

### **Example No. 1**

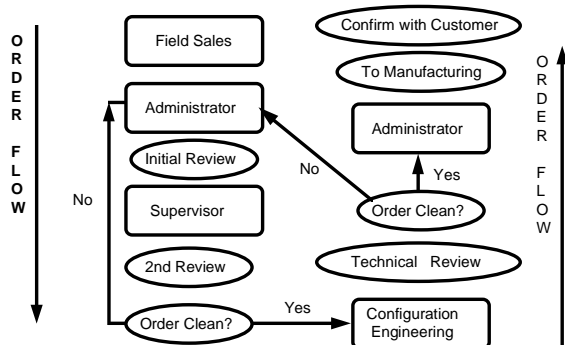
Client Industry: Telecommunications: Hardware

Background: The client designs, assembles, and installs complex communication switching equipment. The quotation process is complex requiring many components and complementary peripheral items. Lack of all items will make the equipment non-installable and inoperable. The sales process requires several calls to establish credibility and then submission of quotes relative to one or more install sites. Development of a quote requires the combined effort of an account executive and a sales engineer. Quotations require the use of proper pricing and use of currently released components with subordinate sub items. Changes to quotes were often required due to customer changes in specification or clarification. Thus, a process which required considerable time the first time had several iterations before even being considered for purchase. The process was further complicated by an extensive product list and specifications which resulted in account executives being confused as to full configuration requirements. Once accepted, the quotations were converted into order format and submitted to a review process to ensure terms, manufacturability and completeness. The review was necessary because the account executives simply made too many errors which would be show stoppers in manufacturing and installation. When errors were found, the process would become bogged down in corrections with the result being lower margins. The review process involved 35 people organized in a cascading set of steps. The combination of queue time before review and remedying errors virtually doubled manufacturing lead time. With this type of lead time delays and uncertainty about when items would enter production, account executives were constantly polled by their clients for updates on schedule or status. In this environment, the only tool available is the buddy system, therefore, review people often spent additional time looking to see where an order was at in the review process. Once the order reached manufacturing, the need to meet delivery dates was often in conflict with efficient scheduling (inventory and costs). In addition, expediting on the manufacturing floor had a cascading effect which embroiled the whole organization. Despite the best efforts of the entire client organization, the customer was not pleased. Longer promised delivery dates made the client appear non-competitive or competitive only at a lower margin. Over time, the client acquired an image in the marketplace which depressed sales revenue.

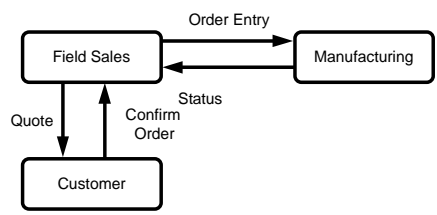
Solution:

Analysis and redesign of the order process resulted in an immediate recommendation to restructure the order review process so that each individual customer administrator oversaw the whole order. This immediately simplified order status issues and reduced the queue time considerably. The systems solution for the quote, order, and review process was the development of a configurator module which worked on each account executive's notebook computer. The configurator assists the account executive in quoting consistent and complete components using the correct price and terms. Communication between the sales engineer and the account executive was augmented by electronic mail which also operates on the notebook computer. The configurator reduced the time to create a quote and allowed the account executive to respond to changes virtually on the spot as opposed to a lengthy turnaround as required by other vendors. Thus the client now had a competitive advantage. More importantly, the quote and resulting order were automatically configured to be ready for manufacturing so they went directly into the manufacturing queue as a "clean order". Manufacturing now had more lead-time to schedule efficiently and there was less pressure to expedite in-process orders. Order status reporting was also placed on the system, the account executives do not have to rely on the buddy system and the company is taking on the image of being a technological leader.

Sales Order Process ( Before Automation)



Sales Order Process (After Automation)



- Automated:**
- Order Prepared on Laptop by Field Sales
  - Checks/Reviews on Laptop
  - Electronic Pricing
  - Configurator
  - Instant Information Access for All Organizations
  - Field Sales Direct Link to Manufacturing

- Net Results:
- Selling time increased by 33%.
  - Order cycle time was slashed from 66 days to 3 weeks.
  - Over \$5 million in-process inventory made available for other purposes.
  - Order accuracy improved by 25%.
  - Order administration costs reduced by 20%.
  - Sales increased 20% with same head count.
  - return on cash investment in less than 10 months.

## **Example No. 2**

Client Industry: Construction Products

Background: The client uses a syndicated data base to notify sales reps of project approval and start dates. Given the long lead time between initial approval and the actual specification or ordering of the material, it was at the sales reps discretion (or tracking capability) as to when the sales process actually started. The long lead-time and the use of a paper based system resulted in losing leads or simply getting on track too late. The client maintains an extensive library of local, state and national building codes and specifications, and specifications and studies supporting the capabilities of their products. Sales reps carried as much material as they could handle in paper form. But paper is difficult to keep current and paper systems require filing and organizing. It is desired that the sales reps use a consultative sales process in the conduct of business, but with paper based systems this process was by no means assured.

Solution: Review of the sales process revealed that some reps started the sales process early and others later in the development of a project. Those who started early used a consultative sales process and built a "value-added" relationship using specifications and other references to advise or compare alternatives to the client's products. This process resulted in the products being specified on drawings or spec sheets creating no-bid situations for their products. Other sales reps started later, and depended on using price performance arguments at the time of the bid.

Though both sales processes were successful in garnering business, the consultative selling process generated significantly higher margins and left those who had been exposed to the approach more receptive to the client's products for future projects (longer term perspective). Given the superiority of the consultative selling process, an account management module was developed that helped the sales reps track leads and enter at an earlier point in the project. Since the system resides on a notebook computer, leads are not easily lost and it was possible to track success (lead management).

The consultative sales process was further enhanced by an electronic link to the corporate library which provided on-line access to reference documents. During the call, the sales rep can call information up on the screen and provide instantaneous answers as opposed to requesting the information from corporate. Thus, the sales cycle was made more efficient. In addition, the image of the company was enhanced by providing a service commensurate with the performance of the products.

Net Results:

- 4% increase in sales productivity
- 10% increase in sales effectiveness
- An overall 1 % change in gross margins
- 100% return on investment within 18 months

### **Example No. 3**

Client Industry: Hospital Supply

Background: The healthcare industry is under intense pressure to reduce costs while operating under a high level of uncertainty. The hospital supply market is characterized by commodity type purchases and low margins. The client adopted a differentiation strategy which stressed offering low delivered cost to the hospital while capturing higher margins. This was accomplished through distribution center location and other inventory management arrangements which equated at the extreme to just-in-time (JIT) performance levels. At the heart of the strategy was the emphasis on building relationships and maintaining a focus on delivered cost to the hospital.

The sales organization was encouraged to pursue a consultative sales approach and be opportunistic in terms of developing tighter linkage with the hospitals in terms of inventory control. At the extreme, sales people will conduct periodic inventory checks of high value materials so that the hospital maximizes its turns. This sales presence builds relationships with people who can specify products or approve substitutions which would favor the client.

Hospital systems were built to deal with the transaction needs of billing, payroll, and payables. As administration is expanded within hospitals and materials management is added, these people are starved for information, so they turn to the distributors. These topics can range from usage of a product by department to handling a stockout.

Though this is an ideal situation for the client's sales force, they lacked any tools to efficiently handle the disparate demands placed on their time. All of the information resided in various mainframe databases but access, consistency, and accuracy varied accordingly. The sales reps were forced to lean on customer support reps operating out of the distribution centers to obtain the data they required. There were also problems identifying acceptable substitution products because the client maintained an incomplete reference on competitive products. The demand for information and fire fighting became the norm and the disruption carried over into the distribution center. Thus, at one level the client was trying to accommodate customer needs while that very act caused a decrease in customer service elsewhere.

Solution: The client needs segmented into five basic areas:

- Catalog, price, substitutability, issues
- Contract pricing, usage issues
- Order status
- Inventory monitoring tools
- Analytical, presentation tools

An electronic catalog was developed which resides on the sales rep's notebook computer. The catalog includes all of the information required to make substitution decisions. By updating the catalog electronically, the data is as good as the last update. Availability of this information dealt with the problem of having knowledge concerning competitive products and provided added value to the customer base.

Query capabilities were enhanced by providing a user friendly and intuitive interface on their notebook computers. Thus, the reps can reference price, usage, and order status information without the involvement of the people at the distribution center and at the customer's premises.

Inventory monitoring tools were developed which use a pen-based interface to quickly input inventory levels. The system automatically generates the recommended order and provides period end reports for the customer.

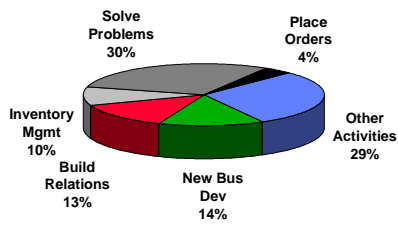
The sales reps are also provided with analytical and presentation tools which are intended to assist sales reps in studying and recommending solutions to hospitals for substitute products or inventory services.

These tools allow the sales rep to reduce administration and trouble shooting time and reinvest that time in consultative selling. In addition, the tools allow the client to extend and expand its coverage without a proportional increase in head count.

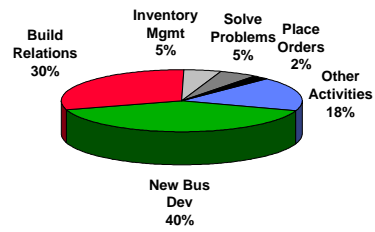
Results:

- Increase in sales effectiveness 20%
- Gross margin increased by .1%
- Incremental \$8 Million saved over the life of the project

**Sales Rep Time Analysis -  
Before Reengineering**



**Sales Rep Time Analysis -  
After Reengineering**



#### **Example No. 4**

Client Information: Consumer Goods

Background: Client committed to a management strategy of decentralization to support the evolution of local level marketing. The sales organization lacked systems and infrastructure to support this move. Call reporting and reports distribution was done on an ad hoc basis using paper documents. Sales people had very large territories with complex and inconsistent call criteria.

Retail coordination and reporting was non-existent, leaving major account people to survey stores to evaluate conditions. All customer order information had to be requested by phone from a customer service representative. Sales calls were frequently devoted to fire fighting problems with orders.

Most communication and coordination were done by telephone resulting in disruption of personal time.

Solution: It is impossible to create systems without a definition of the desired processes or infrastructure. The analysis documented current systems and a variety of informal systems. A vision statement was then created consistent with the decentralization strategy.

Gap analysis was used to identify key processes which needed to be developed. Process redesign was used to define the new processes. In some cases, the analysis had to define decision methodology and bottom-up planning processes to support decentralization.

Once the new framework for managing was defined, it was possible to convert portions of the system into computer-based applications. The applications included territory management and call reporting systems which feed relational data bases with key operational data. Electronic mail was introduced to link the field sales force together and to be able to communicate without impacting the other person's schedule. Order status was made available on the system so that sales people can identify problems and take action before they make the call. Tracking of promotion and account level advertising support was provided for major accounts so that their performance can be evaluated during business reviews. A series of reports and other tools were provide to management to assist them in managing the business.

Results:

- Productivity improvement of 5%.
- Incremental profit of \$1.3 million per year
- Exceeded the discounted hurdle rate of 25%

## **About The Author**

Glen S. Petersen is an internationally recognized speaker, writer, practitioner, and thought leader in the Customer Relationship Management (CRM) and e-Business industries. Mr. Petersen has held senior level management positions with systems integration and end user organizations. As a visionary and early adopter of Sales Force Automation (SFA), in 1986 Mr. Petersen led one of the first successful national implementations of SFA in the United States. Realizing the tremendous future of this new technology, Mr. Petersen joined a SFA software start-up company in 1988 and had the pleasure of working with many of the pioneering organizations that deployed sales force automation at a time when most organizations were unaware of its existence. In 1991 Mr. Petersen left the vendor community to do consulting.

This experience combined with his background in operational and strategic planning places Mr. Petersen in a unique position to advise and assist clients in this challenging area of change management and technology integration. During this period, Mr. Petersen has developed a number of proprietary facilitation techniques, which help organizations to better understand the potential of these technologies, and how to rally the organization around a single threaded, phased implementation approach.

Prior to founding GSP & Associates, Mr. Petersen was Senior Vice President at ONE, Inc. and Ameridata, a \$1.3B provider of hardware, software, and services. In these positions, Mr. Petersen directed operational strategy engagements and helped major corporations articulate and justify their CRM and e-Business initiatives.

Mr. Petersen is the author of six books:

- *High-Impact Sales Force Automation: A Strategic Perspective*
- *Customer Relationship Management Systems: ROI & Results Measurement*
- *Leadership and Alignment In A Customer Centric World*
- *ROI: Building the CRM Business Case*
- *CRM Best Practices: Self Assessment*

Glen is a frequent speaker at DCI (CRM conferences) and has developed a number of pre-conference and on-line seminars for them over the past five years. Mr. Petersen has also conducted seminars and presented at conferences created by Inc. Magazine and The Center for Business Intelligence. Topics include sales and marketing performance, the blurring of the role of marketing, sales process modeling, strategy, best practices, and return on investment (ROI) as they apply to CRM.

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