White Paper

A Strategic Model For Sales Force Automation

The Value Chain Concept

Prepared by:

Glen S. Petersen

GSP&Associates
Achieving Growth Sustained Profitability

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Executive Summary

An investment in a sales force automation (SFA) system represents a capability that should serve the organization for a period of approximately five years. Given this time-frame, it is essential that companies consider their strategic direction before committing to a system.

Moving into the 21st Century, two key themes emerge: growth and globalization. Globalization demands that the company create a central strategy while maintaining the flexibility to adapt to local market conditions. Research regarding growth strategies has identified two basic approaches - one is to maintain a superior competitive price/performance position and the other is to "out innovate" the competition. Regardless of strategy, the realities of the marketplace are that the cross bar continues to be raised; thus, an organization can ill afford to invest time and resources in an initiative that innovates or improves performance in areas that do not enhance competitive advantage.

The aforementioned competitive strategies depend on understanding the customer and anticipating what the customer will value in terms of products and services. Without such insight, the company is left to blind investment, which is certain to diminish financial performance.

SFA offers the ability to improve operational performance (costs/productivity), but more importantly key applications can enable the sales organization to add value to the customer base. To tap into this capability, one must understand what customers *value*. Further, these applications must be consistent with the strategic direction of the company; otherwise, the actions of the sales force will not be aligned with the organization as a whole and the initiative will die.

To deal with this strategic issue, it is recommended that companies utilize a value chain framework to identify opportunities for improved performance and innovation. This analysis will provide key information that can be used to guide strategy and the design of SFA applications.

On a parallel path, technology referred to as Supply Chain Management (SCM) is rapidly emerging as a strategic tool to reduce costs and shorten cycle time. This technology also has a direct impact on strategy; the good news is that the same value analysis identified above also should direct efforts in this area.

The implications of the SCM capabilities on the definition of SFA applications go beyond strategy formulation and performance. The tools associated with SCM link the customer to the company in ways that offer substantial value added in areas that historically were the domain of sales. Examples of this include web sites with electronic catalogs, configurators, inventory reporting, etc. Thus, the tools of SCM offer the ability to change the nature of the sales-customer interface.

The challenge for each organization is to leverage these capabilities to seize opportunities and gain unique competitive advantage. Central to this issue will be to understand the basis for adding value within the expanded enterprise of suppliers, manufacturers, customers, and final

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customers. For this reason, it is necessary to integrate the initiatives of SFA and SCM within the framework of strategic direction.
An example that captures the radical nature of these changes is the current competitive position of Encyclopedia Britannica. For 217 years, Encyclopedia Britannica was the number one supplier of encyclopedias. Recently, it fell beyond Microsoft and Grolier who adopted a CD version of the encyclopedia. In a classic enterprise strategy, Compaq has agreed to bundle the Grolier CD with all new computers, thereby increasing value to the consumer, while generating sale and use of the Grolier encyclopedia - without incurring sales costs. Britannica is responding to this competitive situation by offering encyclopedia services on the Internet via a subscription basis. Britannica has changed from a physical distribution channel to a digital one; this has changed its entire organizational structure to correspond to a new digital economy.

Every company is vulnerable to this type of shift in competitive position. Technology and competitive pressures are forcing change at unprecedented speed. The traditional barriers of capital, distance, and economies of scale are no longer valid. SFA is a useful and effective competitive tool, but even a superlative install at Britannica would have significantly altered their competitive position. Companies must look at their competitive position from an enterprise perspective and then apply SFA as well as other strategies to leverage their position in the marketplace.

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Competition In The 21st Century

There is general agreement among analysts that global competition will intensify in prominence and strength as we enter the next century. Technology will continue to shrink the boundaries of distance and time. Corporations are re-orienting themselves toward growth objectives, having learned that efficiency-based strategies did little to leverage competitive advantage. The return of growth strategies is causing companies to re-consider strategic planning and explore a new concept referred to as *Knowledge Management*. For SFA to have relevance it must be positioned in the context of these broader initiatives.

The challenge for the global manager will be to build worldwide teams of regional managers who understand the company's local markets and cultures as well as their products, services, and technology. The global manager must be able to communicate, collaborate, and conduct business anywhere, at anytime. These needs represent an unprecedented wealth of technology; the good news is that many of the required applications already exist, such as e-mail, video conferencing, and multi-media. The challenge is adopting creative ways to utilize them so that they represent strategic advantage. For the global manager, this means being able to build team work and make connections between his company and the customer, while neutralizing organizational walls that are the result of faulty assumptions and impede flexibility.

From a corporate strategy standpoint, most gurus of strategy are urging companies to decentralize the strategy creation process, forcing the process away from corporate. Planning must include integration with key customers and suppliers. Similar to the challenges of the global manager, operating level management must also seek team building linkage.

The classical growth strategies include the following:

1. Selling more to the same base of carefully selected customers. This model is represented by USAA selling auto insurance to military officers.

2. Systematically create new products or services faster than competition. Gillette and 3M represent good examples of this strategy.

3. Establish control of a market as it grows. Intel and Microsoft represent success with this type of strategy.

4. Establishing a new product or service delivery vehicle to the customer. Dell Computer selling PC's over the phone represents a good example of this strategy.

Charles Lucier and Amy Asin of Booz-Allen & Hamilton reported in *Strategy & Business* that the conventional wisdom regarding the relationship between shareholder value and revenue may not be valid. After comparing the financial results of more than 1800 companies during the time period 1974 to 1994, the link between revenue growth and share holder-value growth was found to be inaccurate and potentially misleading. Based on this research, they formulated two basic strategies that correlate with creating long-term shareholder value:

- **The Managed - Growth Paradigm:** Focuses on achieving market and cost positions superior to competitors through better planning and management. A good example of this type of approach is General Electric.

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- **The Innovation - Growth Paradigm:** Leverages strategic innovation or a stream of product innovation to drive growth and revenue. In other words, the company does something that is different from its competition and that its customers perceive to be of significantly superior value. A good example of this strategy is The GAP.

The implications of this research are:

- Companies in virtually every industry have the potential to create superior long-term growth in shareholder value.
- Companies must choose one of the two paradigms.
- The paradigms differ substantially in implications and risk.

Shifting away from the traditional approaches to growth and profitability, new concepts are being formulated that operate on the notion that by working with direct competitors, customers, and suppliers, a company can create new business, markets, and industries. This new concept is referred to as *co-evolution*. Following this concept, strategic planning focuses on opportunities to change the rules of an industry to its advantage, resulting in sustained growth and superior profitability. One of the key ideas of this concept is to remove the limitations of the traditional "industry" context and think in terms of a "business eco system." A business eco system is a system in which companies work cooperatively and competitively to support new products, satisfy customers, and create the next round of innovation in key market segments. In general, these approaches encourage the company to remove artificial or traditional methods of segmentation and focus on the delivery of value to the ultimate customer.

The final concept that is being positioned as key to the 21st Century is knowledge sharing. If the 1990's represented an **information era**, the 21st century will be the **knowledge era**. The next step is using computers and technology to take data and information and translate this into knowledge that is easily accessible.

Success in the marketplace is increasingly linked to an organization's ability to manage and leverage its intellectual capital - the intangible and often *invisible assets* such as knowledge and competence of people, intellectual property, and information systems that don't show up directly on the bottom line but, are as valuable as financial assets. Lewis E. Platt, chairman, president, and CEO of Hewlett-Packard states that: "Successful companies of the 21st Century will be those who do the best job of capturing, storing, and leveraging what their employees know."

Skandia, the international insurance and financial services company, defines intellectual capital as the gap between the market value and the book value of a company's shares. They further define intellectual capital as a combination of human capital and structured capital. Human capital represents the knowledge, skill, and capability of individual employees to provide solutions to customers. Zurich-American's competitive strategy is to focus on customer's industries rather than products, which allows them to leverage knowledge and add value beyond the basic insurance product.

The ability to provide unique solutions to a customer's business problems is a hallmark of the knowledge-rich company and a great source of competitive advantage to those who will adopt the capabilities to do it well. As with any emerging strategic concept, knowledge management

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remains elusive to define and measure; yet, it is conceptually obvious. A close analogy is the cost of quality. Before practitioners added the cost of getting quality product out the door, these costs remained unrecognized by the organization. Similar to the quality movement, knowledge management will require new processes, behaviors, and incremental costs.

Thomas Davenport, writing for *Strategy & Business* identified ten principles which help to frame the challenges associated with this new competitive concept:

1. Knowledge management is expensive. Employees need to be trained to capture, package, and categorize knowledge. Similar to the cost of quality, the cost of not doing this is expensive.

2. Effective management of knowledge requires hybrid solutions involving both people and technology.

3. Knowledge management is highly political; knowledge is associated with power.

4. Knowledge management requires knowledge managers. Clear responsibility must be established. The goal should be to facilitate the creation, distribution and use of knowledge by others.

5. Knowledge management benefits more from maps than models, more from markets than hierarchies. Letting markets work means that knowledge mangers try to make knowledge as attractive and accessible as possible.

6. Sharing and using knowledge are often undesirable acts and must be part of performance evaluation.

7. Knowledge management means improving knowledge work processes. These include market research, product design, and transaction processes like order configuration.

8. Access to knowledge is only the beginning. Access is important but successful knowledge management also requires attention and engagement. Attrition has been said to be the currency of the information age. Employees and managers must become more engaged with knowledge.

9. Knowledge management is a continuous process not an event.

10. Knowledge management requires a knowledge contract. It is basically a call to concerted efforts to capture, organize, and share employee knowledge.

Of 80 corporations surveyed by Arthur Andersen during a 1995 knowledge conference, more than 75% identified knowledge management an essential part of their strategy but more than 90% acknowledged that they had not developed reliable ways to link knowledge management to financial results.

In summary, what can be anticipated about competition in the 21st Century is that speed and flexibility will remain key capabilities. Corporations will seek growth strategies based on globalization and competitive advantage. The most striking advances in competitive advantage

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will occur in those situations where an organization is able to change the rules of competition to its advantage. This will require organizations to understand their environment as an extended enterprise and seek new linkages with suppliers, customers, and even competitors. It is obvious that the need for responsiveness is not consistent with "in-house" type of strategies. Since companies will seek to operate with leaner staffing, while retaining a responsive attitude, knowledge management will become a key capability from both an operational and planning perspective.

SFA needs to be on the forefront of these changes. It has been demonstrated that downsizing does not enhance competitive advantage. Companies must build an infrastructure that will support strategic planning at the operating levels and create the framework for migrating to the knowledge era. Today's technology can leverage sales efforts to support the organization's direction, but there must be a framework or perspective to guide this activity. The value chain concept is offered as such a tool. It provides the "enterprise" perspective discussed earlier which is essential to identifying opportunity and it integrates well with parallel technology developments in supply chain management.

Although it is possible to justify an SFA investment strictly on cost criteria, an organization is ill served by such an approach. Clearly, the future will be characterized by unprecedented speed of change. Companies must anticipate change to be successful; the value chain model is an important ingredient to making this happen.

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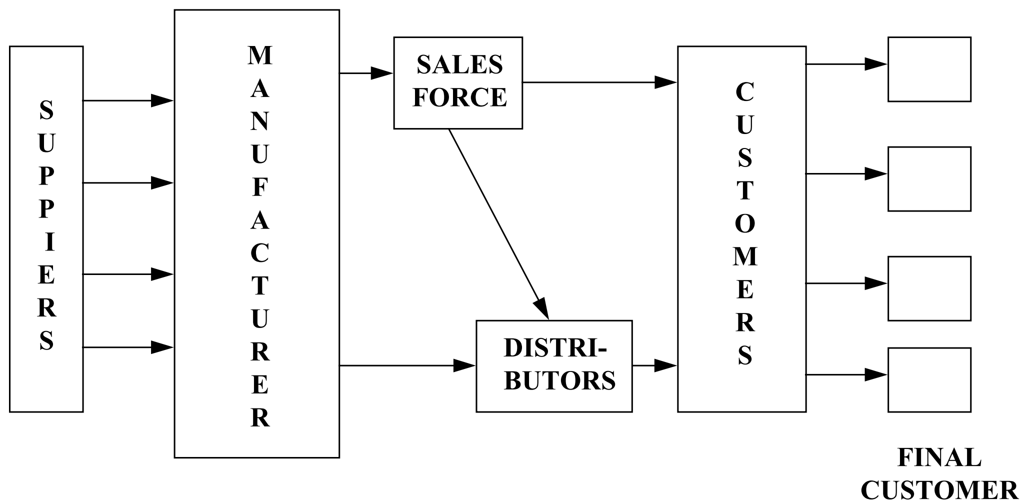
The Value Chain Model

It should be obvious that change is not going to slow down; indeed it is reasonable to expect that change will increase in tempo in the foreseeable future. If strategic management is to be effectively deployed to the operating levels of an organization, then there must be a shift from crisis management to one of opportunity management. The opportunity manager takes the time to solve tomorrow's predictable problems today. In general, planning is concerned with identifying today's decisions that allow for tomorrow's capabilities. What is required is a model that helps the organization to identify opportunities and develop strategies; one such model is referred to as the value chain i.e. how is value created and delivered to the ultimate customer?

The tool box of the 21st Century is essentially in place today. Unfortunately, capabilities such as e-mail and video conferencing are being used as cost saving devices rather than competitive or opportunity impact solutions. This section will develop the concept of the value chain model as an important element in establishing strategy and positioning the sales function and related technology needs.



The intent of the value chain is to trace the path of the delivery of products and services to the ultimate customer. It must be emphasized that the model is meant to be conceptual in nature and is not a call to measure costs and time factors to *fourteen decimal places*. The model helps to visualize the conversion, delivery, and communication processes with a focus on the final or end customer.

In the example, the model reflects a manufacturer that sells to a customer base who in turn sells to a final customer. This model is consistent with a consumer goods company, but it is applicable to any business supply entity. The model could reflect the delivery of a service without substantially altering the diagram.

From a value added perspective, the model appears as indicated on the next page.

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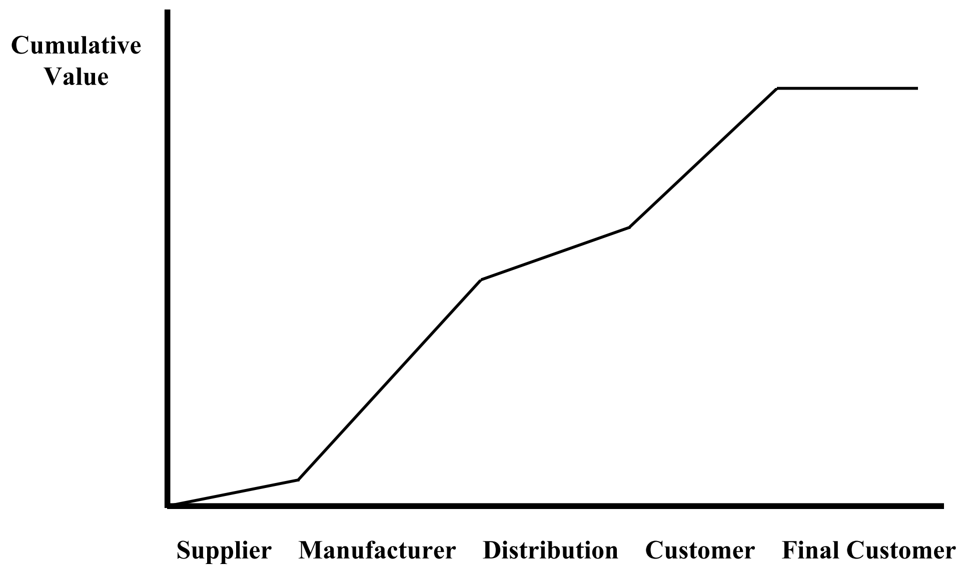

Each stage is assumed to add value to the process. Note that a corresponding graph could be created for incurred cost at each stage. This perspective would reflect the relative efficiency of each stage. From an opportunity standpoint however, the greatest competitive gain can be achieved by studying the value needs of the final customer. The entire process is meaningless unless the final customer receives commensurate value associated with the purchase. Thus, the strategic need of the manufacturer is to understand the value needs of the final customer and deliver these requirements in a superior manner relative to price so as to achieve competitive advantage.

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Value

Central to the concept of the value chain is the definition of value. Although the term is used extensively, it often remains undefined. Intuitively, one would define value as the price one is willing to pay for the item in question. This is a reasonable definition, but if the issue is broadened to the question of what components or attributes contribute to that perception of value, then the response takes on a different flavor.

Before discussing the question of value attributes, it is important to point out that the term "Final Customer" in the models and discussion is a blanket term used to describe the *customer's customer.* This final customer could be a consumer or another business entity. One should not limit the perspective of this analysis to the next layer of customer on an arbitrary basis. Since the decision regarding the number of layers requires significant discussion, the use of the term, *final customer*, will connote a minimum of the next layer.

For business-to-business transactions, the relevant issue of value is "competitiveness" i.e. how does the product or service contribute to the customer's competitive position in the marketplace? Competitiveness can relate to a host of attributes such as cost, flexibility, image, marketing, etc. On this basis, competitiveness is as intangible as value; therefore, an alternative measure is required. A reasonable surrogate for value and competitiveness is profitability. If a supplier helps a customer to be more "profitable," then it is reasonable to assume that the supplier is adding "value." One could argue that cost is an equally appropriate measure, but cost cannot easily accommodate flexibility, time compression, or market related issues that impact a customer's demand. Thus, a supplier's intent should be to positively impact its customers' profitability as effectively as possible, thereby garnering maximum margins for itself.

Given this perspective, it should be obvious why a supplier should be interested in its customers' strategies and customer base. This information will provide insight into capabilities that the customer will value because of the contribution to its competitiveness. Knowledge of the end user base provides a validation of the customer's strategy and expands the supplier's perspective regarding enterprise solutions that dramatically improve delivered value, while increasing margins for the supplier.

The alternative to this approach is to take the **four wall** mentality that is "what is good for me is good for the customer." This attitude is conducive to thinking **inside the box**. If ever there was an era that requires thinking **outside the box**, it is now. Corporate strategy that is created in the vacuum of the corporation will result in being caught in a no-win competitive corner. Value will be the currency of the 21st Century.

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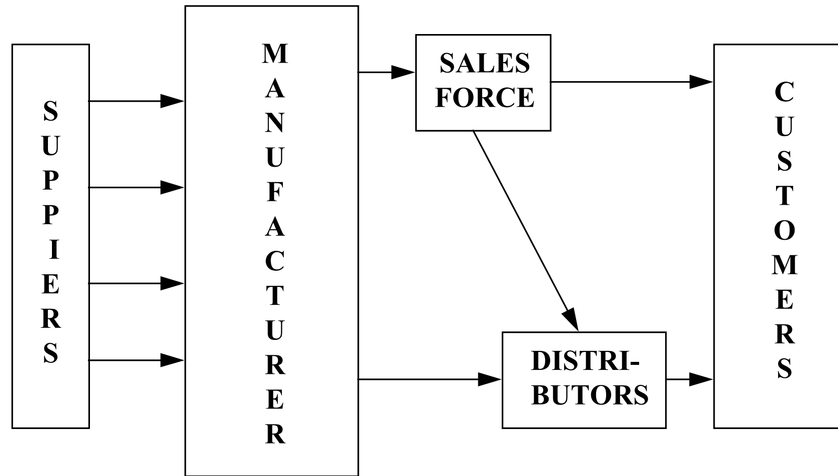
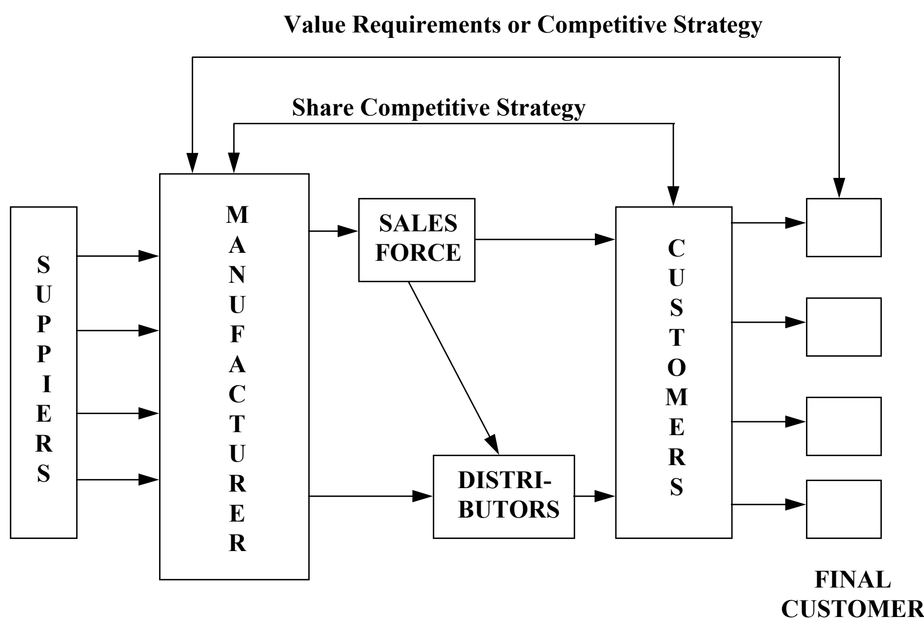
A Process Perspective

Having defined value and the value chain model, it is now possible to discuss the management of these relationships from a process perspective. Most organizations have only a partial view of the value chain as indicated below:



The missing portion of the model is identifying the final customer. Manufacturers do not know their customer's customer and are often ignorant of the customer's competitive strategy. Without these vital pieces of information, it should be clear that the manufacturer would be purely guessing regarding opportunities to add value. Further, the manufacturer has no mechanism to decide whether a specific customer is one that will grow or is worthy of investment in terms of building a closer relationship. These issues are critical to strategy formulation, but also to tactical use of the sales force. In general, one would want to be able to guide the sales force in seeking a customer mix that will match value with price; failure to do this will inevitably erode margins. Assuming that the manufacturer establishes a competitive and value oriented dialog with the customer base, the value model takes on the following form:



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In this diagram, the manufacturer has a dramatically improved perspective regarding opportunities and risk:

- Knowledge of customer strategies and their customer base allows the manufacturer to segment by value rather than simply volume or SIC classification.

- Knowledge of competitive strategy provides insight as to how the manufacturer can increase the customers' profitability e.g. systems that reduce lead-time or inventory requirements.

- Knowledge of competitive strategy provides insight regarding value added by distributors and their relevance to the customer longer term.

- Knowledge of the value needs and direction of the customer's customers provides additional insight regarding competitive opportunities, growth potential, and viability of the customer.

Armed with this type of information the manufacturer will have a better perspective with regards to issues such as:

- The opportunity for joint marketing and which end users to target.

- The impact of shortening order fulfillment and other related transactions.

- Feedback from the customer to guide development efforts.

- Customer impact to identify value added opportunities that the sales force or distributors can fulfill.

- The input to help sharpen customer mix and targeting of sales activity.

- Insight from the customer to identify the relevance of the sales force and/or distributors.

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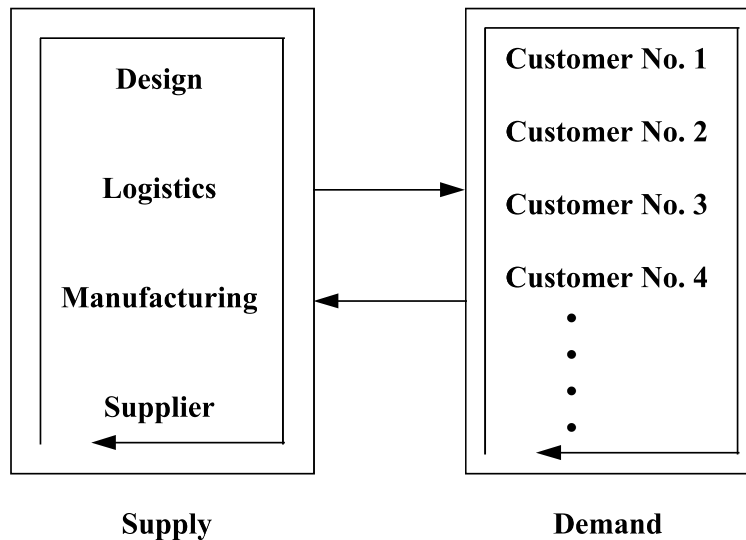
Supply Chain Management

From a technology standpoint, a supply chain can be thought of as an information conduit that balances a company's business needs on both the supply side and demand side. The goal of Supply Chain Management (SCM) is to optimize the business operations of a company so that it can meet customer needs across the supply enterprise which includes distributors, suppliers, and customers. Graphically, this relationship can be described as follows:



It is the intent of supply chain management to reduce the requirement of system level inventories while substantially reducing total cycle times. These goals represent an opportunity to substantially reduce costs, while increasing responsiveness - a major source of competitive advantage.

Although the concept of SCM has been in existence for years, it has become a very "hot topic" as companies seek to reduce cycles times. Technology has fueled the expansion in interest. Object-oriented programming has made it possible to better integrate the activities and functions on the supply side, whereas the Internet has expanded the ability to link and integrate demand and supply activities. The current tool box allows for the following types of applications:

- General purpose e-mail
- Dissemination of public and marketing information
- Access to technical specifications
- Sales proposals
- Electronic catalogs
- Shipping status
- Product/service configurators
- Shipping reservation/commitment
- Electronic data interchange
- Financial transactions
- Product data management
- Electronic buying groups

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These capabilities provide the framework to interface with customers in radically new ways. The ability to exchange data and information instantaneously provides an opportunity to create new business rules, which essentially changes the competitive landscape.

These technologies and strategies can have a major impact on the structure of the sales force. The ability of the customer to obtain information directly (electronically) from the corporation means that certain tasks and roles historically assigned to the sales function may be eliminated or accomplished without a direct sales force. This same technology offers opportunity for the direct sales force to add value to the customer. If a company follows a strict cost or productivity approach, it will no doubt seek to reduce the size of the sales force. However, an opportunity based strategy will seek to gain competitive advantage through adding value. Thus, knowledge of the customer base and its ultimate markets becomes the keystone of addressing this issue. The next section will address this issue in greater detail.

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Relevant Technologies

Understanding customer strategies and their target markets is essential to the strategies associated with competition in the next century. Growth strategies are based on innovation and managing customer retention. Global competition is dependent on blending a central strategy with the realities of local markets and knowledge management is focused on customer based solutions.

Customer retention is becoming recognized as a requisite for profitable growth in the 90's. Recent research has indicated that customer retention and customer satisfaction are not synonymous. A satisfied customer may not be a long-term customer; it is a question of **relevance**. What satisfies the customer today may not be consistent with tomorrow's needs. Thus, understanding customer direction and strategy is no longer a luxury but a necessity.

Based on the clear benefits and imperative of this information, most organizations should be doing this type of analysis. However, gathering this information and analyzing it competes with the immediacy of today's needs. Fortunately, today's tool box contains a number of technologies that facilitate the process and offer value added that is difficult to emulate without technology. The following examples provide an overview of these capabilities:

- **Web Sites:** A web sites can be used for a variety of value added applications including:
  - Provide a source of general information to customers and the customer's customer.
  - Provide a means for end users to communicate to the organization e.g. electronic surveys.
  - Replace electronic catalogs
  - Provide design/recommendation capabilities (configurators)
  - Provide order status for direct ship customers
  - Provide inventory status and order entry capabilities.

- **The Web as a Network**
  - Provides an e-mail capability
  - Provides EDI capabilities to a wide range of customers due to cost of setup and operation.

- **Sales Force Automation:** This technology can provide a diverse set of applications that can add value via the sales force. Examples of these applications include:
  - Opportunity or territory management applications facilitate capturing customer strategies and other value preferences. These applications often facilitate team support of the customer.
  - Configurators can be used for order entry, proposals, or the generation of design recommendations.
  - Electronic catalogs can provide instant access to reference parts and pricing. This data can include specifications and pricing.
  - Multi-media represents an opportunity to graphically demonstrate concepts and communicate with diverse audiences. The technology also augments training and raises overall skill levels.

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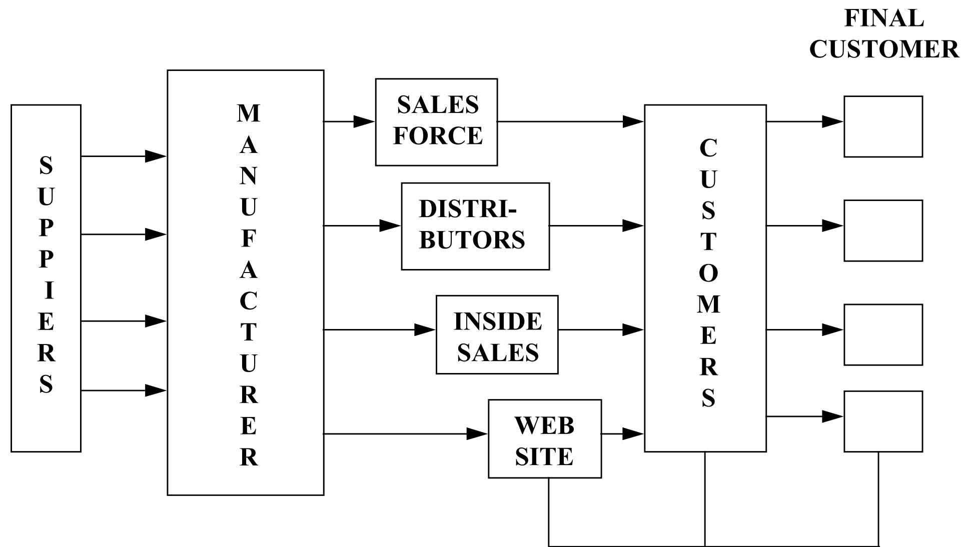
- **Call Center Technology:** Call center technology provides an effective interface from inside sales and utilizing customer service for inside sales purposes.

The implications for the value chain model can be characterized as follows:



Although the model does not appear radically different, the impact of these technologies can be enormous. Consider the following:

1. The sales interface now consists of four separate entities that represent dramatically different cost and value added options. The new mix of capabilities should reduce costs, while providing desirable value added for the customer. Although the cost aspect is clearly desirable, the emphasis should be on delivering unique value. For example:

- The direct sales force could provide tools that help the customer reduce market cycle time.
- Distributors could add services to the value mix by providing fabrication or additional design capabilities.
- An inside sales capability may be desirable for customers who desire instantaneous service and sales expertise.
- A web site may be capable of unique services not addressed by the above options; for example, searching for optional sources of supply, etc.

Thus, each component provides a basic set of services, but also provides a unique capability. Each customer receives value added consistent with **their** perspective of needs.

2. Each component of the sales effort could provide a unique value add, while a networked capability would allow for timely communication and coordination. Thus, customers would receive a service delivery capability that leverages the best aspects of each component.

3. The web site can be used as a vehicle for communication with customers and end users. The company can benefit from a better understanding of the final market, which will guide strategy with its customer base.

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Developing A Strategy

Despite the fact that these technologies can dramatically impact competitive position, they represent an enormous amount of investment and organizational change. Thus, implementing this level of change requires a careful plan and a multi-functional approach. It is beyond the intent of this white paper to provide a detailed implementation plan; however, the following outline does provide an overall plan of attack:

1. Members of senior management should be utilized to conduct high level meetings with customers that represent the top 80% of value (80/20 rule). These meetings should cover specific topics such as competitive strategies, patterns in the market, end user industries, use of technology (particularly EDI and the Web), expectations for suppliers moving into the 21st Century, value provided by the sales force, etc.

2. Members of regional management should conduct parallel high level meetings with customers that represent a sampling of the remainder of the customer base.

3. An internal study should be conducted to determine internal readiness for EDI and Internet capabilities. This study should also capture performance implications such as reduction in head count, cycle time, and operational costs.

4. The various business briefing teams need to summarize their findings. The findings should be categorized by value needs and strategy versus product considerations. In general, they should address directional issues involving linkage with the company including EDI, Internet, and the direct sales force.

5. Assuming that there is sufficient rationale and concerns on the part of the customer base, a study of EDI and Internet capability should be launched. The intent of the study should be to establish an implementation strategy.

6. On a parallel path, a team should be established to define the needs of the sales organization in terms of system applications. This study should integrate internal needs with external customer expectations and present on implementation strategy similar to item No. 5 above.

7. If the company is not currently using inside sales, it is best to approach this aspect on a limited regional basis. This approach provides the insight for successful implementation and proves the model and results to justify expansion to other regions.

8. The findings from items 5, 6, and 7 should be integrated into a unified implementation plan with timetables and expected results.

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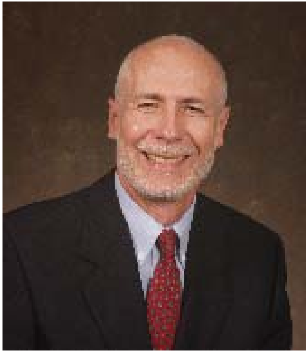
About GSP & Associates

GSP & Associates, LLC is a consultancy that is dedicated to helping user organizations to leverage their investment in CRM related tools. The company provides expertise in the strategic and operational application of CRM tools, sales tools, sales process modeling, and business case development and ROI analysis.



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 sold and 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*
- *CRMS: ROI & Results Measurement*
- *CRM Leadership and Alignment in a Customer Centric World*
- *ROI: Building the CRM Business Case*
- *CRM Best Practices: Self Assessment*
- Making CRM An Operational Reality

Mr. Petersen can be reached at 505-771-1956 or gpetersen@competitiveperformance.com

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