A White Paper

Selecting A Sales Force Automation Vendor

Vendor Management As A Key Component

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GSP&Associates
Achieving Growth Sustained Profitability

I. Executive Summary

The history of sales force automation (SFA) is filled with disappointment and unfulfilled expectations. Some analysts have pegged the failure rate of these projects at a level of 70%. A closer look at these "failures" suggest *a rush to act* before understanding the implications of those actions. The result of such a knee jerk action is inflated investment and missed opportunity.

There is no "guaranteed" methodology to avoid risk in the area of SFA. By its very nature and application, SFA must be adaptable to changes in the marketplace and be constantly re-inventing itself due to constant change in the applicable technology. The only practical response is to understand the source of risk and take prudent steps to minimize its occurrence while seeking to leverage the competitive advantage the technology offers.

The driving vehicle for vendor selection must be an end user driven and business based needs assessment. This process should span a period of five years which is a typical life cycle for a project - from start to replacement by a new system. The needs assessment should define a migration path for user applications, functionality for the user, and the integration of the system into the current and projected IS environment.

Selection of a software solution must be driven by the needs assessment and comprehend the full planning horizon for the project. This approach supports a comprehensive view of the selection process from a functional, operational, and financial viewpoint. The vendor selection process must include what is needed and expected from the vendor during the planning horizon and the risks associated with that vendor. The best indicators of vendor performance during this time-frame are the qualities of the management of the vendor.

As indicated above, the primary focus of a SFA system should be the end user community (sales organization). No matter how technologically superior a system is, if the end users fail to utilize it, the investment will be of limited value. The vendor must support an operating environment that is "workable" from a corporate standpoint. The ultimate solution must operate between these parameters. This white paper encourages evaluating vendors on the basis of user acceptance, costs, benefits, and risk over the entire planning horizon; the project team must approach this decision as a balance of these factors. Absolutes such as corporate policies need to be applied in the context of their business implications.

This white paper emphasizes a selection perspective that looks at the vendor from the "inside out;" the reason for this approach, is that vendor performance can best be anticipated from this vantage point. It is the intent of the white paper to provide insight rather than absolutes. Each organization must ultimately establish its own decision criteria; however, the important factor is to maintain a balanced business perspective that addresses the relevant time-frame of the planning horizon.

In approaching vendor selection and negotiation, remember that most user organizations represent a scale that is many times the size of the vendor. Although a client organization will desire to protect its risks, negotiated constraints and terms that unreasonably restrict the vendor or force the vendor into counter productive activities, ultimately serve neither organization. Balance must be sought.

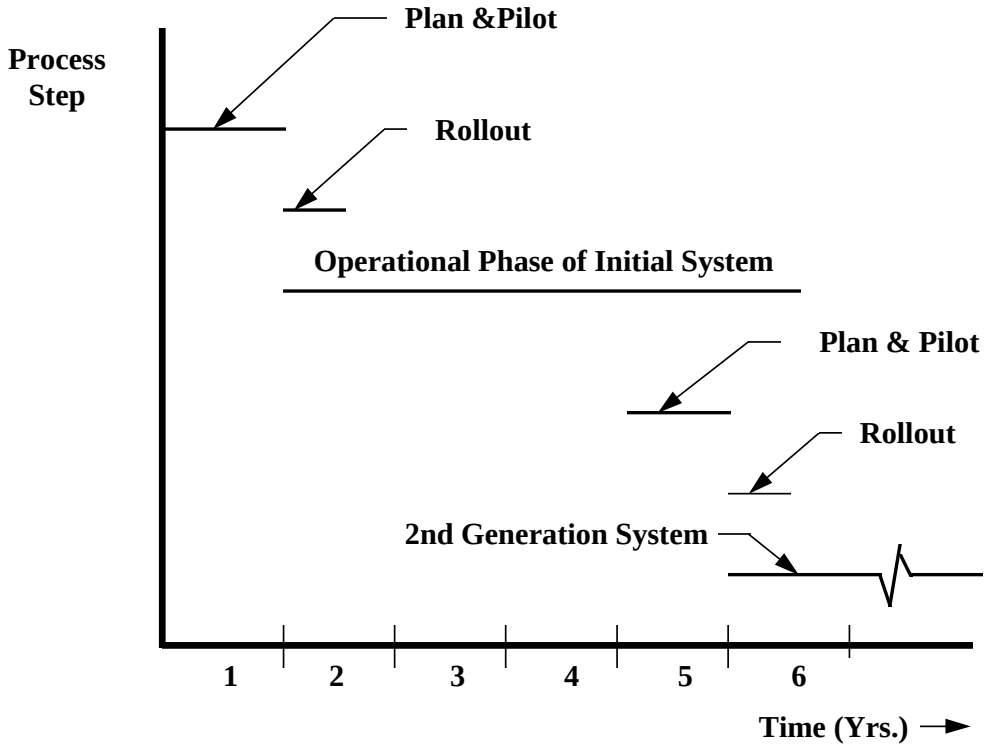
II. The SFA Planning Horizon

One of the key concepts of vendor selection is that SFA systems have a finite life and that a properly executed needs assessment should capture the projected functionality required during the life of the system referred to henceforth as ***a planning horizon***. Given this premise, the search for a vendor becomes focused on meeting the needs of the organization over the period of the planning horizon. Although most organizations would like to be able to anticipate a longer term relationship with a vendor, the industry has not proven to be able to support such a concept. The ability of vendors to migrate successfully (and timely) from one operational platform to another has not occurred on a consistent basis, particularly when that transition requires a new user interface. This is not an impossibility, but rather a reflection of the complicated nature of managing a vendor organization.

Many factors support the notion that the practical planning horizon for a SFA system is five years. Defining factors include:

- Competitive needs of the organization are likely to change and expand during this time period.
- Expansion of the existing system often becomes economically undesirable as newer more flexible or systems with better performance become available.
- New technology platforms and hardware are likely to emerge, generating incompatibilities between the field sales function and other key internal or external groups.
- Corporate standards may change.
- The failure rate of laptop hardware is likely to increase to unacceptable levels.

If the planning horizon is in the area of five years, then the actual field time for a system is less than four years. The following chart demonstrates this relationship:

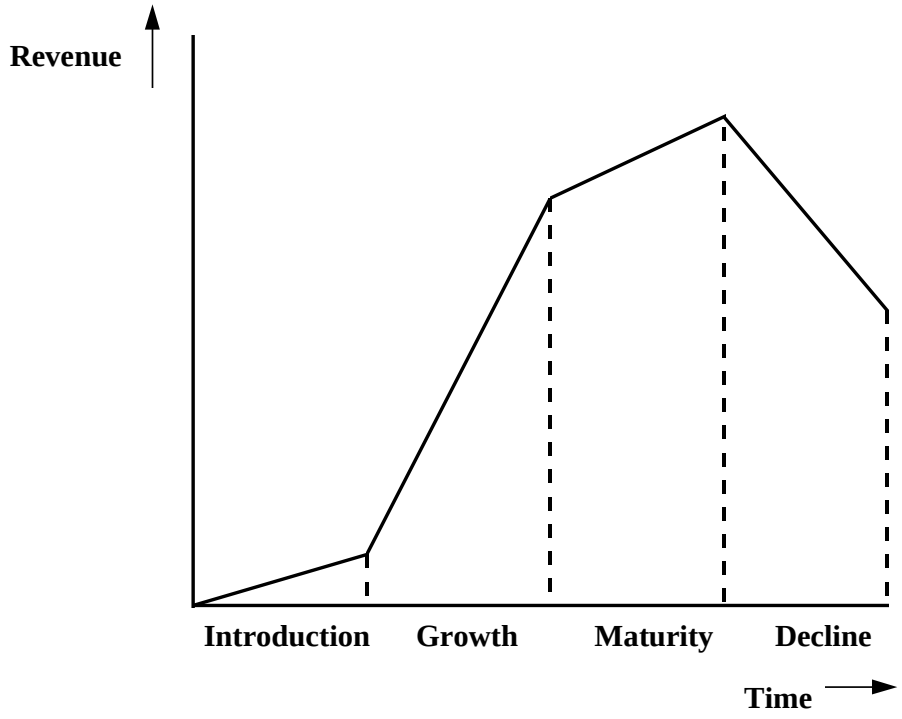


The timeline from this chart may actually be optimistic. Except for systems that require no customization or linkage to legacy systems, it is very difficult to plan, design, develop, and pilot within a one year time-frame. Add to these steps, the likely need to modify the pilot system design and it is easy to see how additional slippage can occur. Since the tasks themselves are not the limiting factor, but rather decision time tables and staff availability, it becomes obvious that management of internal resources is critical during this phase of the project. Also, if the system is to replaced in year six , then planning and pilot of the second generation system must occur during year five. Indeed, this is a pattern that can be expected into the future.

The relevance of this timing to vendor selection is absolutely critical. In a time-frame of less than ten years, major SFA players have risen to prominence and essentially disappeared. Considering the reasonable probability that a different vendor may have a superior product (given the next five year planning horizon) at the time of planning and pilot of the second generation system, **then the vendor selection gravitates to one of evaluating the vendor's ability to perform during the planning horizon for the system.** What happens during this period is more likely to be influenced by the quality of the management of the vendor than by the technology it possesses at a given point in time.

III. The Life Cycle For SFA Software

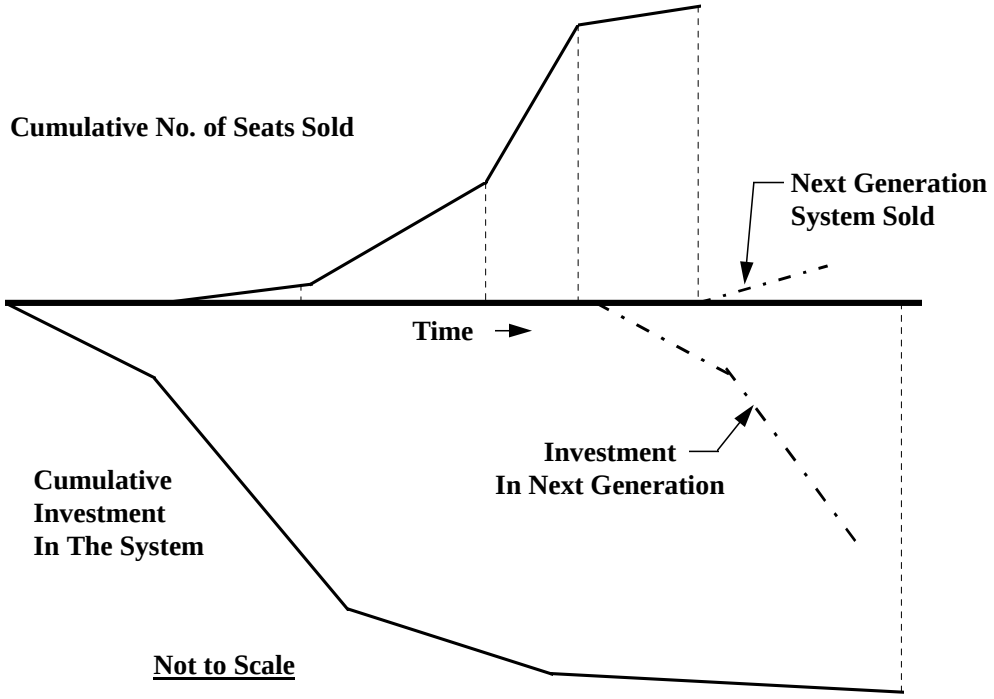
The management and financial issues associated with SFA vendors are better understood if placed in the context of a product life cycle. In the classical product life cycle model, the revenue or volume growth of the product is segmented into four phases as outlined below:



According to this model, a product goes through several phases which are relatively self explanatory. During each phase, the product requires different marketing and sales support to generate the indicated growth. At some point in the decline phase, the product becomes obsolete - either in terms of need or in terms of substitute products and/or services; at this point it is essentially removed from the marketplace.

SFA systems can be thought of as having a life cycle in the context of a specific operating system. In this context, *number of seats* is an important indicator of revenue growth, market penetration, and general acceptance in the marketplace. Support of this growth requires sales and marketing effort, but it typically involves substantial amounts of investment in the development, refinement, and expansion of the system. Management of this process will impact operational and financial performance by the vendor and will be reflected in the quality of output to any given client; therefore, it forms a linchpin for evaluating and managing a SFA vendor.

Given the relevance of product life cycle and the critical nature of growth, in terms of number of seats versus investment, it makes sense to combine these concepts into the diagram outlined on the next page.



The above diagram is meant to illustrate the parallel behavior of investment versus the building of volume. Initially, a vendor must invest in the creation of at least a demonstrable framework for a system in order to secure an initial customer. With closing initial business, the vendor can invest a substantial amount into the system to make it an operational reality. As the vendor attempts to secure additional business, client pressure will be applied to expand the features or capabilities of the system; this will drive additional investment. As the system matures and confidence is gained in the capabilities, there is an influx of business. Care must be taken during this period to manage additional investment commitments versus investing in the next generation product. Finally, a point is reached where system investment is largely diverted into the next generation of product. Investment in the initial system must continue to support commitments regarding future installs and rollouts. Investment is also required to maintain the current software in the field. Once the next generation software is available, the sale of new business will virtually always be with the new technology. Thus, for practical purposes, sale of new seats will involve the next generation software.

The growth and investment curves also represent significant challenges from an operational standpoint. As the growth of the organization rises rapidly (steepness of the curve), the organization must grow without incurring cash flow problems or dilution of performance. The orchestration of these changes requires different management skills than those required at the original startup, thereby requiring a transition on the part of management. The system development area must follow a similar challenge. Issues and actions that could be accomplished over morning coffee must now be coordinated through many people and process steps. Discipline and infrastructure must be introduced into an environment, where just months prior, creativity and long hours constituted success.

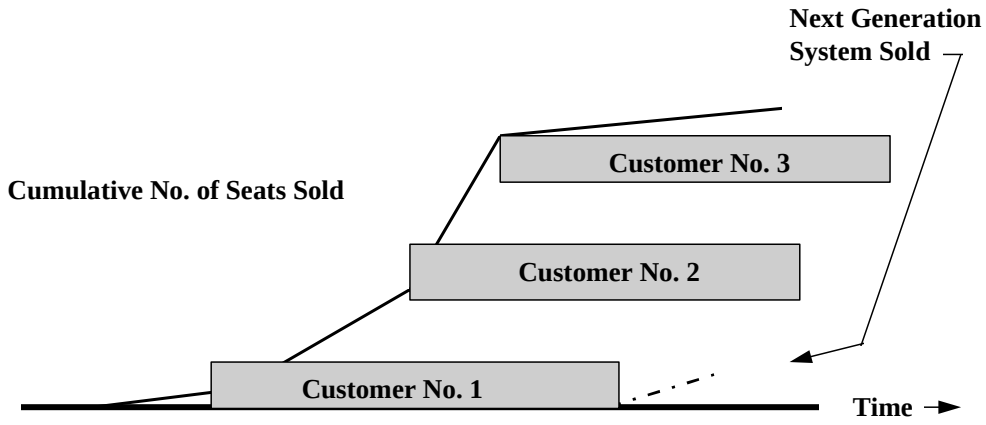
It should be obvious from the above diagram that software vendors are subject to significant cash flow problems with regard to investment and revenue. Thus, one of the critical issues is to manage investment and particularly investment in the existing system versus investment in new

technology at the appropriate time. Though this may appear to be an obvious decision, the timing is typically clouded by client and prospect indecision and the noise level in the marketplace. Another complicating factor is the impact on financial performance as to the timing of these events. Pre-mature commitment and announcement can erode confidence and strain cash flow; waiting too long can result in lost leadership and momentum.

IV. Integrating The Concepts

Given that a SFA system involves a finite planning horizon and that a replacement system will undoubtedly involve new technology, there is a significant probability that the current supplier either is not in a position to meet the needs for the next generation system or another has a better fit. The large number of vendors in the market and the speed of technological change increase this possibility. On this basis, the focus of vendor selection shifts from long-term viability to performance during the system planning horizon.

The following diagram overlays the planning horizon of three customers that purchase the vendor's system at three distinct points in the system's life cycle. Customer No. 1 represents a company that implements the system early in its life cycle; whereas Customer No. 3 adopts the product later in the cycle. As will be explained, each customer is exposed to a different set of risks; therefore, in approaching the selection process, each customer must focus on somewhat different issues.



As an early adopter, Customer No. 1 must be concerned about the following:

- Viability of the vendor organization due to its lack of presence in the market.
- Stability of the system.
- Timing of enhancements that have been promised as part of the initial contract.
- Availability of key resources as the vendor moves into high growth phases of its product life cycle. This is particularly true during the last half of the palnning horizon.

Customer No. 2 selects the vendor as the vendor enters the period of highest rate of growth. Thus, the cusotmer must be concerned about:

- Viability of the vendor organization from a cash flow standpoint. Will they over commit?
- Timing of promised enhancements due to conflicting requirements from the customer and prospect base.
- Availability of key resources.
- Adequate training for new people.
- Commitment to maintaining the current system as resources are invested in the next generation product.

At the end of the growth cycle, Customer No. 3 selects the vendor. On the surface, this may appear to be a conservative choice in that at this point the vendor has a stable product and a solid customer base. There are liabilities as indicated below:

- Viability of the organization as it migrates to a new platform(s).
- Availability of enhancements due to a desire to commit resources to new product development.
- Commitment to maintaining the current system over the planning horizon due to the significant overlap with the new system.

The level of risks that each customer faces during the planning horizon will be greatly influenced by the attitude and actions of the supplier's management. Thus, understanding the motivation and orientation of the vendor's management is critical to assessing the level of risk. The following sections will outline the types of issues that need to be discussed and the implications of the answers received. Before starting this discussion however, it is important to understand the evolution of SFA software vendors as an initial framework.

V. Evolution of an SFA Company

There is no universal model for SFA companies; however, it is reasonable to assume that the company starts with a core group of people that includes one or more highly technical individuals. This group develops a business plan based on a product idea and its potential in the marketplace. This plan may include a committed customer who needs specific attributes associated with this design.

Since the development of an SFA product requires a significant capital investment, funding is often a function of personal funds plus investment funds from venture capitalists and/or a small group of initial customers. Investors, regardless of the source, are going to want to see a return on their money as quickly as possible and ideally with a significant multiple of the original investment. This level of return is required to compensate for the risk associated with their investment.

The investment climate places pressure on the principals of the organization to move the system to market as quickly as possible. How quickly the product must be ready to market is a function of whether initial customers are essentially "funding" the development process. If customers are not involved in the "front-end," then the principals must develop sufficient capabilities to demonstrate the functionality of the system. This would normally include a design concept and specifications, but not complete operational functionality. The strategy is one of utilizing the needs of initial customers to drive and "finance" the completion of the functionality.
How robust a system is, in terms of operational completeness and documentation, is a function of the demands of the initial installs and market pressure applied by prospective customers.

A critical juncture occurs when the investors desire to re-capitalize the company. Timing is critical because the transaction could place the vendor in a cash flow position that undermines current operations or under-funds the development of new technology. In addition, re-capitalization can motivate key employees to leave the company or otherwise reduce focus which impacts operational performance from a customer's perspective.

Thus, vendor evaluation must explore the position of a vendor relative to the timing of new product development and the financial objectives of the people who are financing the company. These details must be matched against operational requirements during the planning horizon to assess risk. Specific issues and questions will be addressed within the section that follows.

VI. Senior Management Issues

While it is difficult establish hard guidelines, SFA customers should consider the following areas as a means to asses the general level of risk associated with a vendor:

- **Ownership of the Company:** Ownership in the company is a positive incentive to perform from a financial standpoint. Ownership ceases to be an incentive if financial performance falls too far below expectations. On the other side of the equation, if ownership is represented by marketable securities, then there may be a temptation to liquidate one's holdings and leave the company. Thus, ownership does not necessarily equate to stability.

- **Vision:** The existence of a vision suggests that management has "thought through" a direction for the company. A plan and commitment to that plan are substantially more important. In general, one must look at the financial objectives of the plan and the orientation of the key players to assess how real or operational the plan is relative to organizational behavior.

- **Dispersion of Expertise:** The critical skills for most SFA vendors include technical expertise and management of technical resources, project management, and overall business management including marketing. Complete dependence on one person for a critical role suggests a vulnerability, particularly if that expertise is hard to replace.

- **Background of Key Players:** Have the key players been involved in other start-ups? At what point did they enter/leave these companies? The issue here is to gain some perspective regarding the experience base of the players in terms of transitioning from start-up to an organization that needs infrastructure to sustain profitable growth.

- **Turnover:** Indications that key people are leaving the company may signal dissatisfaction by the investors or a lack of cohesion among the principals.

- **Organizational Structure:** An organizational structure that has too many layers/functional groups or a number of people that is not consistent with the level of business are warning signs. Too many layers or departments suggest a lack of investment in infrastructure that will choke the organization during times of peak growth. Insufficient head count suggests outsourcing that may represent an invisible constraint. Excess layers/departments also tends to dilute financial performance and ultimately will lead to agendas that are not in sync with customer objectives.

- **Accountability:** What are the measures of performance that are used to reward or evaluate the performance of key players? If these are strictly financial, there is good reason to believe that operational performance may be compromised to reach financial targets. Lack of accountability for performance criteria critical to customer requirements is a clear warning sign.

- **Investment Strategy:** How an organization invests in its business has immense importance on it's viability. There are three key areas for investment (1) the current system, (2) replacement of the current system, and (3) infrastructure. Each area has its benefits and liabilities. Continued investment in the current system to gain maximum yield may

jeopardize future viability by delaying the release of new systems. SFA vendors are notorious for "the shoe maker's children" syndrome (lack of internal systems support), this can weaken financial and operational performance and severely undermine an organization in the longer run. Understanding an organization's behavior in this area will reveal a great deal regarding their viability during the planning horizon.

VII. Operational Issues

Senior management issues always influence operational performance; thus the following items are related to the above list but are better understood in the context of specific processes. The following list is not meant to be exhaustive but it does highlight issues that frequently represent "gotcha's" even when companies are implementing for the second or third time.

Defining how operational issues will be managed during the course of the planning horizon is a key issue in vendor evaluation/negotiation. The vendor is typically driven to leverage investment in the current system and to restrict investment in the current system to capabilities that will increase the breadth or depth of application in the marketplace. This orientation may or may not be consistent with customer requirements as outlined below:

- **Ready to Market/Ready to Sell:** Does the vendor have criteria regarding readiness for the marketplace? If not, then the buying organization must establish a checklist to determine what functionality exists today and its operational viability.

- **Testing Protocols:** What level and type of testing precedes a pilot operation or rollout? Pilot programs may be approached by the vendor as a beta test; this may not be acceptable to the customer. An install can quickly lose credibility if bugs occur in key areas or with a frequency that interferes with field performance. If the vendor does not utilize rigorous test protocols, then it is up to the customer to develop and implement appropriate tests and allow sufficient time to correct critical problems.

- **Management of Bug Lists and Fixes:** This may appear as a trivial area to review, but for many vendors it is an *Achilles Heel*. Prioritization of bug fixes and the management of the correction process, if not well managed, will generate continuous problems for a vendor and it's customers. The issue has three parts: (1) priorities from a customer standpoint, (2) problems that are easily fixed, and (3) management of the correction process i.e. does correcting one problem create a new one elsewhere in the system? What process does the vendor have in place to prioritize fixes that reflects customer needs and how are shortsighted remedies avoided? Simply assigning these responsibilities to one person does not guarantee a well managed system. This area is a potential source of future headaches; do not let the vendor gloss over it. **Seek specific measures of performance**.

- **Enhancements and New Functionality:** One of the critical processes for both the vendor and customers is the prioritization of enhancement development. Vendors will be biased to add functionality that they believe will increase their attractiveness in the marketplace. Unfortunately, this same interest may not be shared by existing customers; therefore, it is critical to discuss this process prior to selecting a vendor. To the extent to which future requirements can be described to the vendor, the availability of these applications during the planning horizon should become a vendor commitment.

- **Investment in Infrastructure:** Infrastructure pertains to training, processes, policies, and automation that support the vendor's operation. The rapid growth pattern associated with SFA system life cycles demands a capability to quickly ramp up internal processes. Typically, this ramp up is accomplished by adding people and layers of management. A total reliance on adding people is seldom satisfactory. Training and hiring standards often become compromised and the result is profit erosion, loss in flexibility, and a general decline in

quality of performance. If an organization is truly building for the longer term, there must be plans and commitment to establish a scaleable infrastructure. Failure to do this will place the vendor's organization in jeopardy.

- **Management of Workload:** The SFA industry is notorious for business coming in bunches. From a vendor standpoint, it is desirable to close as much business as possible to maximize revenue and gain return on the investment associated with the business. Also, customer project teams are often subject to *hurry up and wait* type of behavior. Therefore, there is a significant temptation to over commit. A customer must be cautious to lock in key resources and ensure adequate resource commitment and timetables.

- **Transition to New Operating System:** Success in developing a system and support organization on one operating platform does not imply success in migrating to a new design using another platform(s). The management skills change and the technical people who made the first system successful may not fit the new environment. There are also training issues that involve significant portions of the organization. To further complicate matters, this transition may occur during the transition from venture capital; thereby diverting the attention of key management. Understanding where this transition is likely to occur during the planning horizon is a key consideration in selection.

VIII. System Operation

The intent of this document is to discuss operational and management issues associated with vendor selection. In this context, systems architecture will not be addressed; however, there are operational issues that are common to all systems. The following list identifies some common areas that may not receive review prior to vendor selection, yet they can add costs and threaten the credibility of an install. Since the next section will address the issue of trade-offs, understanding cost implications is important to the final decision. The following list provides a checklist of issues that should be discussed with a vendor as part of the review. *In general, it is desirable to ask vendors exactly how these areas work. Very often a vendor will use jargon that does not accurately describe the mechanics of their system; it is easy to be mis-informed on checklist type items.*

- **Communications Sessions:** The performance and complexity of these sessions are central to user acceptance of the system. Therefore, communication should be a simple and seamless process. The following are some typical issues that will dictate the acceptability of the communication process.
  - Need for more than one communication session to access all applications
  - Single session as a bi-directional transfer of data
  - Error recovery capability
  - Length of sessions
  - Success rates
  - Method for transporting changes
- **Backup of the System:** System backup is key to the integrity of the system, but these processes can impact the availability of the server and can lead to frustration. This issue is tightly linked to communication.
  - Backup of data on the PC and the server. How is it accomplished and how frequently?
  - Timing and duration of the backup. Backup of the system can encroach on the availability of the system for regular communication.
  - Largest system currently working with? Current systems can provide a reference to use for benchmarking of scalability.
- **Data Synchronization:** The integrity of data bases is critical. How is integrity maintained? When conflict in data occurs, who wins and how are the conflicts resolved? Does the system maintain referential integrity? Does the system provide WAN/LAN access? Is true LAN access available to internal users?
- **Transfer of Accounts (Reroutes):** Describe the process of making these types of transfers from both a server and PC level. How can data synchronization problems arise? If the process of making changes is too complex or time consuming, field sales people are likely to invent informal systems. Once this happens, the system will start to erode.
- **Administrative and Maintenance Tools:** The field sales environment is subject to constant change. If the system cannot respond quickly to change, it will loose its appeal as a tool and informal systems will arise.
  - Diagnosis of problems
  - Adding data fields
  - Adding users
  - Changing tables
  - Screen layouts
  - Data synchronization rules (requires changes in code?**).** Changing code typically requires

extensive testing of the system before it is sent to the field. This type of testing can require significant testing and delay getting changes to the field organization.

- **Time to Pilot:** The time required to modify the system for readiness to pilot can have a profound impact on the usability of the system. Does the vendor have tools to expedite the process and make design iteration workable and reasonable? Customization of the system can be a major source of cost and have significant impact on schedules. What is the vendor estimate for this phase of the project versus the experieince of cusrrent customers?
- **Interface With Legacy Systems:** What protocols does the supplier use? Are there tools to expedite this process? SFA systems will have limited value if it is not possible to share data with existing (legacy) systems. Without tools this can be a very costly process. An equal amount of time and cost can be spent linking with legacy systems as is commited to customizing the end user system.
- **Documentation:** How well documented is the core system? What is the process for capturing changes? Is it used?
- **Services:** The availability of services is of significant benefit to most customers in that the customer can learn by watching the vendor, particularly during pilot. In general, services reduce the time required to go to pilot because the vendor has minimal learning curve (assumes vendor has trained resources available). Vendor services give the customer time to hire and train resources. Typical services include:
  - Design and customization of the system
  - System operation
  - Training
  - Help line
  - Hardware preparation and replacement

IX. Managing The Trade-Offs

It is highly unlikely that any system is going to be a perfect solution; therefore, the selection process must represent a series of trade-offs. Central to these considerations should be the acceptance and proper use by the sales organization. If the project team looses sight of this theme, it is almost assured of failure. This does not imply that there is zero tolerance for compromise, but it does suggest that other issues must be considered fluid to ensure the primary objective and that is to leverage the impact of the sales organization. Having established this concept as the central objective, vendors and systems can be compared on the basis of benefits, costs, risk, and policy implications.

- **Benefits:** As described above, bedrock to the evaluation should be the acceptance by the sales force. Considerations such as ease of use, rapid and reliable communication, and responsiveness are important qualities to most sales people. The types of applications and their suitability to the sales organization will tend to drive the level of benefits. Benefits should be quantifiable in terms of incremental revenue, costs, and margins.

- **Costs:** The cost equations must include all relevant considerations such as:
  - Investment in the development of the system
  - Hardware and software
  - Interface with legacy systems
  - Support functions and services
  - Communications
  - Added staff
  - Turnover
  - Training (initial and on-going)
  - Maintenance of the system
  - Opportunity costs

- **Risk:** The high failure rate or perceived lack of success associated with SFA installs suggests that risk is a very real consideration for these systems. Risk can often be quantified as a range of impact. For example, an investment estimate could have a range of $2-3 million.

- **Policy:** For many companies, policy is bedrock and is not considered a variable; however, most senior managers would want to understand the implications of policy if there were a major potential impact on cost, benefits, and risk. Thus, it is desirable to approach policy as a variable (i.e. changeable).

Vendor selection can most effectively be approached as a series of filters. The output of one filter influences the direction of and specification of the next filter. Ultimately, one wishes to reach a manageable number of vendors that are viable and worthy of in-depth review.

As stated previously, attempting to manage this process without a business oriented needs assessment will prove to be very difficult. Therefore, it is assumed that an objective and complete needs assessment exist before reaching this point.

- **Filter No. 1:** The first consideration should be the availability of applications, user interface, scalability, and performance capabilities. A customer may also wish to include the time

required to customize the system to meet pilot requirements and the vendor's timing relative to new products.

If an acceptable vendor(s) is not found to meet application requirements, then a systems integrator should be sought who has a successful track record in this area.

- **Filter No. 2:** Assuming that a reasonable group of vendors pass the initial filter, then technology and standards criteria should be applied. Success with Filters No.'s 1 and 2 suggests that other criteria such as policies can be applied without artificially diluting the quality of the solution. If there are significant trade-offs between acceptance via the first two filters, then the organization should explore systems integrators and/or outsourcing of operations as methods to resolve conflicts with standards or policy. In this manner, a cost/benefit construct can be placed on the decision and the decision is taken out of the arena of politics or personality.

- **Filter No. 3:** Given acceptable results with the first two filters, the organization is now ready to apply a set of criteria that will generate a manageable number of alternatives. Business and risk considerations should be applied assuming that they can be reduced to a single quantitative characteristic. For instance, local versus out of state support, initial investment, etc.

Request For Information (RFI's) should reflect the filter concept. Requesting too much detail early in the process delays responsiveness and increases internal analysis time. A sequential process, on the other hand, ensures sufficient response without overburdening any of the participants.

X. Summary Comments

This white paper emphasizes selecting a vendor on the basis of needs that can be defined over the system's planning horizon. It implies that performance during this period will be heavily influenced by senior management and that for this reason SFA user organizations must understand how management intends to run the operation during this time period. This orientation does not in any way suggest that the user organization should approach the decision as anything other than a "partnership" relationship. The planning horizon of five years represents substantial opportunity cost for the end user community and more than a "half-life" for many SFA vendors. It is a non-trivial period of time for both participants, with significant economic consequences.

Vendors should not seek customers that they cannot manage properly and customers must exercise good judgment in protecting their interests and the interests of the vendor. Leadership is required on both sides. The quality of management will ultimately dictate whether the relationship is a win/win or a lose/lose. Taking the time to assess the strength of vendor management and selling internal management on the need for a partnership relationship will pay-off in success for both parties and advance the viability of the industry.

About GSP & Associates

GSP & Associates, Inc. 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

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