

Optimizing Sales Team Performance Using Unified Communications and Collaboration

*How integrating collaboration technology with sales processes can
significantly enhance sales force productivity and effectiveness*

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March 2010

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Executive Summary

Recent economic conditions have caused companies to focus on what they can do to tackle the challenges posed by the downturn as well as how to capitalize on the significant opportunities hidden between the headlines. For sales teams, inaction is probably the riskiest response to market uncertainty, and companies need aggressive and comprehensive approaches that can positively impact sales outcomes right now and into the future.

Data from the Sales Operations Excellence Center shows that participation by sales specialists/experts, particularly during the pursuing and the closing stages of the sales cycle, is critical for achieving sales success. Although many companies have deployed overlay specialist sales teams, they often find that these teams are costly and that they grow linearly with growth of the business. Sales executives are looking for solutions that will optimize the performance of the sales specialists in their organization and scale them so as to improve the ratio of sales specialists to field reps.

When one examines the issues around specialist sales team optimization, three distinct opportunities quickly emerge:

- Reducing travel while increasing the frequency and quality of customer interactions,
- Accelerating performance through finding the right people anytime and anywhere within the organization, and
- Connecting account managers and sales specialists instantly with relevant content independent of the media type: text, audio, or video.

To help sales organizations realize dramatic improvements in these three key optimization areas strategic technologies including unified communications, conferencing and collaboration, Web 2.0, and enterprise social software can be used. However, these technologies work best when coupled with process transformation.

For sales executives thinking about how to optimize their specialist sales force by changing their processes and using these technologies, there is a model to follow. Cisco has created a solution offering that provides the ability to harness specialist know-how – anywhere in the organization – to drive revenue. This solution is modeled after Cisco's internal Specialist Optimization Access and Results (SOAR) program – a highly successful sales transformation program that allowed Cisco sales teams to increase customer interactions by 40 percent, improve customer satisfaction ratings, and reduce travel expenses by 50 percent.

The Cisco Specialist Optimization Solution combines these sales transformation best practices with Cisco collaboration technologies, so that other sales organizations can replicate similar results in within their own companies.

This white paper describes how.





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Levers for High Performance Sales Teams

The recent economic climate has caused companies to focus on what they can do to tackle the challenges posed by the downturn as well as how they can capitalize on the significant opportunities hidden between the headlines. For sales teams, inaction is probably the riskiest response to market uncertainty, and companies need aggressive and comprehensive approaches that can positively impact sales outcomes right now and into the future¹.

According to survey data from the Sales Operations Excellent Center (SOEC), high performance sales organizations achieve successful sales outcomes by focusing on four key sales levers²:





















1. **Process standardization**: This is a codified methodology consisting of practices, activities, techniques, and gates companies put in place to assist and promote the sales effort. Although many sales reps believe sales process do not make them more effective, data from the SOEC shows that high performers follow the process even more than average performers. Process is built into high performer behavior. 
2. **Timely coaching by sales managers**: This is the degree to which reps need coaching by a sales manager. High performing reps do not need as much coaching as average reps; however, average reps can make much better sales progress with timely coaching, particularly during the identifying and closing steps of the sales process. 
3. **Automation and customer relationship management (CRM)**: This is the level to which certain parts of the sales process can be automated and computerized; it also includes technology that enables sales persons to find people or information important for a particular sales opportunity. 
4. **Sales Specialists/Experts**: Most sales organizations require access to specialists or product experts which are brought into the sales process at strategic times to respond to questions and/or to provide superior technical recommendations. Many organizations invest significant resources developing overlay sales specialists to augment account manager knowledge and to help customers commit at critical junctures in the sales process. 

The importance of these four levers varies depending upon which step of the sales process a prospect is currently in as illustrated below.

¹ “Seize Advantage in a Downturn”, David Rhodes and Daniel Stelter, Harvard Business Review, February 2009, <http://hbr.harvardbusiness.org/2009/02/seize-advantage-in-a-downturn/ar/1>.

² The material in this section is based on the Sales Operations Excellence Center's publication, “Unlocking Sales Process Potential” published in 2007. See <https://sec.executiveboard.com/Public/Default.aspx>.

Figure 1. The importance of specific levers in each sales process step.

Process Step	Identifying	Pursuing	Closing	Servicing
Process Standardization 				
Sales Managers 				
Automation/ CRM 				
Sales Specialists/ Experts 				

Adapted from the SOEC.



Sales Expertise Required

Over the past 50 years, companies have become very good at globalization, a process in which “multinationals try to make optimal tradeoffs between the global scale so critical to minimizing costs and the local customization required to maximize market share³.” Product specialization is a hallmark of differentiation, and specialist participation in the sales process is a critical lever for achieving sales success, particularly during the pursuing and the closing stages of the sales cycle. However, overlay specialist sales teams are costly to deploy, and it is often difficult to balance the team’s impact while cost effectively providing sufficient geographical coverage. Many organizations also have difficulty scaling their critical specialist resources. Consequently, one key question every sales executive asks is, “How can we optimize the performance of the sales specialists in our organization?”, or alternatively, “How can we improve the ratio of sales specialists to field reps?⁴”

Enabling Sales Specialist Optimization through Virtualization

Optimizing and scaling the specialist sales team requires identifying and then objectively examining the issues many overlay sales specialist organizations encounter. We list seven of these issues below.

³ Jeffrey R. Immelt, Vijay Govindarajan, and Chris Trimble, “How GE is Disrupting Itself”, Harvard Business Review, October 2009, pp. 56 – 65.

⁴ The Sales Excellence Center indicates that the ratio of overlay reps to sales reps may be 1:7 or lower. See <https://sec.executiveboard.com/Public/BenchmarkingReportOnly.pdf>.

Seven Productivity Issues Specialist Sales Organizations Face

1. *Reducing the Cost of Sales, Particularly Travel:* In many sales organizations, the sales specialist often supports several account managers. Sales specialists can have very large geographical areas and often must travel long distances to meet with the account manager and the customer. Hence, travel costs are an issue for overlay sales teams.
2. *Availability of Experts and Specialists:* If an expert is driving or sitting on an airplane, that expert is not available for consultation with the customer or the account manager – balancing cost, coverage, and impact is challenging for most specialist sales teams.
3. *Face Time with Customers:* Often specialists and experts are involved in doing so much tactical work – such as looking up product technical information or competitive data – that they are not focused on being in front of the customer. Part of this problem is process oriented and part is technology oriented. If a good process supported by search capabilities and human networking technology is not available for an account manager to easily find information, then specialists are often relegated to find it. Some companies report that more than half of sales specialist time is consumed with non-customer facing activities.
4. *Finding the Right Expert:* In many companies, one or more account managers are assigned to a sales specialist. However, if that specialist does not know the answer to a customer's inquiry, then finding someone who does can be a time consuming delay. Most of the time information is shared based on who the account manager or sales specialist knows personally rather than who would be the best *currently available* resource in the company. Sales success is compromised because the right expertise cannot be located and engaged when the opportunity is ripe.
5. *Scaling Specialist Resources to Handle Growth:* As companies expand their portfolios and geographical reach, it is not practical to have a corresponding increase in headcount, particularly as it relates to specialists. A worthy goal is to try to scale the expertise as the organization grows without significantly increasing the headcount.
6. *Compensation:* Sales organizations tend to work similarly in most large organizations – the account manager and the sales specialist have quotas they must fill. There is no compensation for behavior that could impact availability, face time, or scalability for sales experts. Consequently, compensation changes become a big issue when organizations want to optimize the performance of a sales expert.
7. *Mid-Management Reluctance to Change:* Changing the sales process and optimizing specialist resources requires executive leadership and a willingness to try new ways of doing business. Sometimes, middle management can be the biggest barriers to sales specialist optimization because they are directly impacted by any process changes.

Seven Optimization Issues Specialist Sales Organizations Face

1. Reducing cost of sales
2. Expert availability
3. Expert face time with customers
4. Finding the right expert
5. Scaling expertise
6. Compensating experts to change
7. Leadership directives for change

Change is naturally difficult for most people, and unless the executive leadership team is willing to promote and reward change in middle management, change and optimization will not happen.

Collaboration-Enabled Sales Transformation

By examining these issues around sales expertise optimization, three distinct opportunities quickly emerge. Any process changes or technology enhancements designed to transform specialist sales teams need to revolve around and facilitate

- Reducing travel while increasing the frequency and quality of customer interactions,
- Accelerating performance through finding the right people anytime and anywhere within the organization, and
- Connecting account managers and sales specialists instantly with relevant content independent of the media type: text, audio, or video.

Strategic technologies including unified communications, conferencing and collaboration, Web 2.0, and enterprise social software can be used to help sales organizations realize dramatic improvements in these three key optimization areas. Several of these technologies are listed below along with the specific optimization area they impact.

Figure 2. Unified communications, collaboration, Web 2.0, and enterprise social software technologies that can be used for optimizing expertise in an overlay sales team.

	Presence	IM	Audio	Video	Web conferencing	Telepresence	Audio conferencing	Call Center	Wiki's and Text Blogs	Audio and Video Blogs	Enterprise Social Software	Expert Locator	Mobility
Reducing Travel			•	•	•	•	•						
Finding the Right People Anytime	•	•						•	•	•	•	•	•
Connecting People with Information								•	•	•	•	•	

It takes Process to Optimize

Setting up unified communications and collaboration capabilities, Web 2.0 technologies, and enterprise social software functionality is fine, but these technologies work best when coupled with process transformation. Without the corresponding process changes, new technology may actually reduce productivity.

Consider, for example, a company that wants to reduce the travel required of sales experts by making them available virtually. Virtual specialists would in turn lower travel costs while

improving availability and customer face time, but the company must put in place a process for the sales specialists to let account managers know when they are available and how the account manager can contact them. Process issues such as how do account managers access the specialist, how do account managers get Internet access at customer locations to bring experts into the meeting, how do they schedule a specialist's time, etc., must be planned for and implemented as defined process elements.

As expert availability is increased through virtualization, other process changes must also occur. For example, how will sales experts working in a virtual environment be compensated? How will quotas be adjusted and incentives created? How will managers who are familiar with localized overlay sales specialist teams in an area or a region interact and manage virtualized experts who may or may not report to them and may not be directly compensated by them? There are a number of people issues that accompany the process and technology changes, and these must also be addressed.

Additional considerations might include items such as how do people participate in creating the sales wiki? How do expert profiles remain up to date in the enterprise social software tool? How do people get enough information into the enterprise social software tool in the first place to make it useful as a mechanism to search for expertise?

For sales executives thinking about how to take advantage of these unified communications and collaboration tools, Web 2.0 capabilities, and the power of enterprise social software, there is a model to follow. Cisco has created a solution offering that provides the ability to harness specialist know-how – anywhere in the organization – to drive revenue. This solution is modeled after Cisco's internal Specialist Optimization Access and Results (SOAR) program, a highly successful sales transformation program that allowed Cisco sales teams to increase customer interactions by 40 percent, improve customer satisfaction ratings, and reduce travel expenses by 50 percent. In the SOAR program, sales specialists reported time savings of up to 15 hours a week and 70 percent of them also reported quality of life improvements.

The Cisco Specialist Optimization Solution combines these sales transformation best practices with Cisco collaboration technologies so that other sales organizations can replicate similar results in within their own companies.

Here's how.

Cisco's Specialist Optimization Access and Results Program

Cisco faced some tough challenges. The company had been growing rapidly for a number of years, and as it looked at future revenue forecasts, it became abundantly clear that there was need to scale critical sales specialist resources. The company had over 30 new billion dollar technology opportunities (recently expanded to 50) under incubation; if the revenue projections are accurate, the number of new sales experts required to bring in this revenue will be staggering. The cost of hiring and training these specialists will be enormous assuming that enough new people with sufficient technical fundamentals could even be found. The cost of sales, which is not insignificant, would continue rising linearly with revenues.

Cisco knew it had to change, but what process changes and what technology enhancements could be made to solve these formidable challenges?

Quantifying the Process

One of the first steps is measuring existing sales performance parameters. “When performance is measured, performance improves. When performance is measured and reported, the rate of performance accelerates⁵.” Cisco is a company that measures everything, and as it measured elements of its overlay sales specialist organization, some disconcerting facts were found:

1. Travel and entertainment costs for sales experts averaged \$550 per customer visit.
2. Sales experts were spending over 50 percent of their time on tactical, non-customer facing issues which included reviewing bills of materials, searching for competitive information, conducting entry level demonstrations, responding to pricing questions, and reviewing RFPs.
3. Face time between sales experts and customers needed to be increased. Based on the average time spent doing tactical work, traveling, responding to email, and the normal overhead with work, these expensive and highly trained resources were not spending as much time in front of the customer to help make the sale as they could have done.
4. Given the expense required to hire, train, and certify a sales specialist, plus the relatively high burdened employee cost, the ramp up cost of meeting future financial revenue objectives was prohibitive.

When performance is measured, performance improves. When performance is measured and reported, the rate of performance accelerates.

To find out how much time was actually spent in front of customers, Cisco actually had an internal consulting team to look at each sales engineer’s Outlook calendar, counting appointment hours and interactions with customers. In addition, sales experts were surveyed as to how they spent their time. Based on the appointments scheduled in the calendar and the survey data, the company was able to back out the actual face time spent with customers, the time spent traveling, and the time spent on tactical issues.

Setting New Overlay Sales Specialist Process Goals

Understanding that it had to change its sales processes, Cisco launched the SOAR initiative in 2008. SOAR was staffed with a full-time program manager and several senior sales specialists; it had sponsorship from Cisco’s sales executive management, from the company’s Central Development Organization (where all the major business units roll up), and from top Cisco management. The SOAR program examined the sales specialist optimization drivers and issues

⁵ Thomas S. Monson. Favorite Quotations from the Collection of Thomas S. Monson. Deseret Book, 1985.

and coupled these with corporate revenue growth and cost containment initiatives to establish the following broad goals:

1. Significantly increase customer face time.
2. Lower the cost of sales. This objective meshed well with a corporate-wide mandate to reduce travel costs.
3. Provide more sales specialist accessibility to customers.
4. Scale the sales specialists.
5. Significantly increase the impact sales specialists could have by reducing the tactical work.
6. Increase job satisfaction and enable a better home/work life balance for these highly skilled and expensive resources.

Overarching these goals was the requirement that any changes had to positively impact and accelerate sales outcomes.

Specific Process Enhancements Cisco

Implemented

To accomplish the goals established by the SOAR program, process changes had to be made. These changes can be grouped into three broad categories: a move to virtualization, cultural changes, and technology enhancements.

A Move to Virtualization

Cisco determined that in order to cut travel costs, give specialists the opportunity to have more face time with customers, and to provide scale, the overlay sales force had to become virtualized, or at least partially virtualized.

This meant moving sales specialists out of specific geographical areas by creating a “pool” of specialists that any account manager could tap into using communications and collaboration technology. Furthermore, sales specialists would no longer support a single customer segment or vertical such as “enterprise” or “carrier” or “government” – they would be available to support account managers in any area where that sales specialists’ expertise was needed. Supporting multiple verticals is a critical scaling factor because some products, like Cisco Unified Communications or Cisco TelePresence, are sold across verticals.

Virtualizing the role of the sales specialists did not require any physical relocations; it just meant that the account teams no longer had designated sales specialists resources assigned to those accounts. In the larger cities, there are still sales specialists available to visit customers; however, they must be scheduled in advance. Likewise, account managers need to schedule a

SOAR Program Goals:

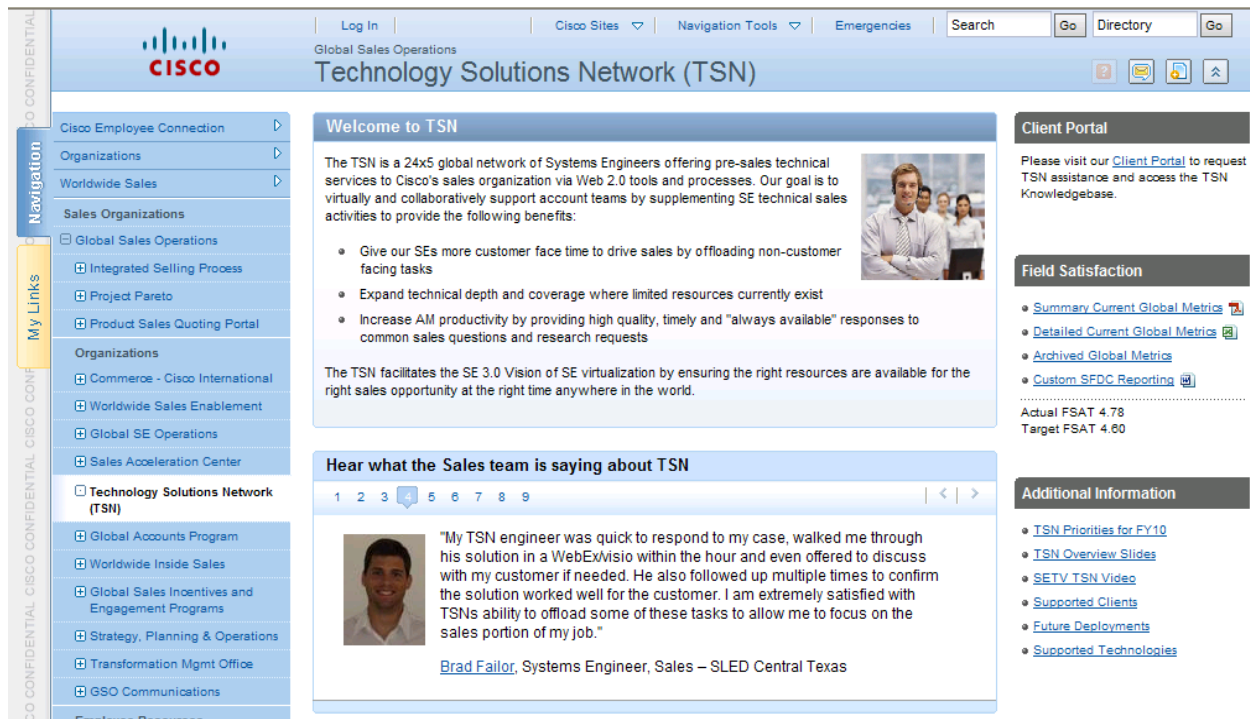
1. *Significantly increase customer face time.*
2. *Lower the cost of sales. This objective meshed well with a corporate mandate to reduce travel costs.*
3. *Provide more sales engineer accessibility to customers.*
4. *Scale the sales engineers.*
5. *Significantly reduce the tactical work sales engineers do.*
6. *Increase job satisfaction and a better home/work life balance.*

virtual sales specialist when a customer visit is to be made with the sales specialist attending virtually.

Virtualizing the sales specialists required Cisco to put in place a process so that when an account manager came across a technical question he or she could not answer, the virtual sales specialist could be made available instantly via a voice, video, and/or data collaboration experience.

A second move Cisco made was to remove sales specialists from doing so much tactical work and to virtualize that function by creating a Technology Solutions Network (TSN). The TSN is a network of dedicated technical specialists that account managers can access to respond to tactical questions such as information on competitors, product specifications, pricing, system design and configuration, bill of materials, and RFPs. Best practices and information gathered from interactions between TSN specialists and account managers are made available through the TSN knowledgebase for account managers to search.

Figure 3. Virtual services available from the Technology Solutions Network.



Cultural Changes

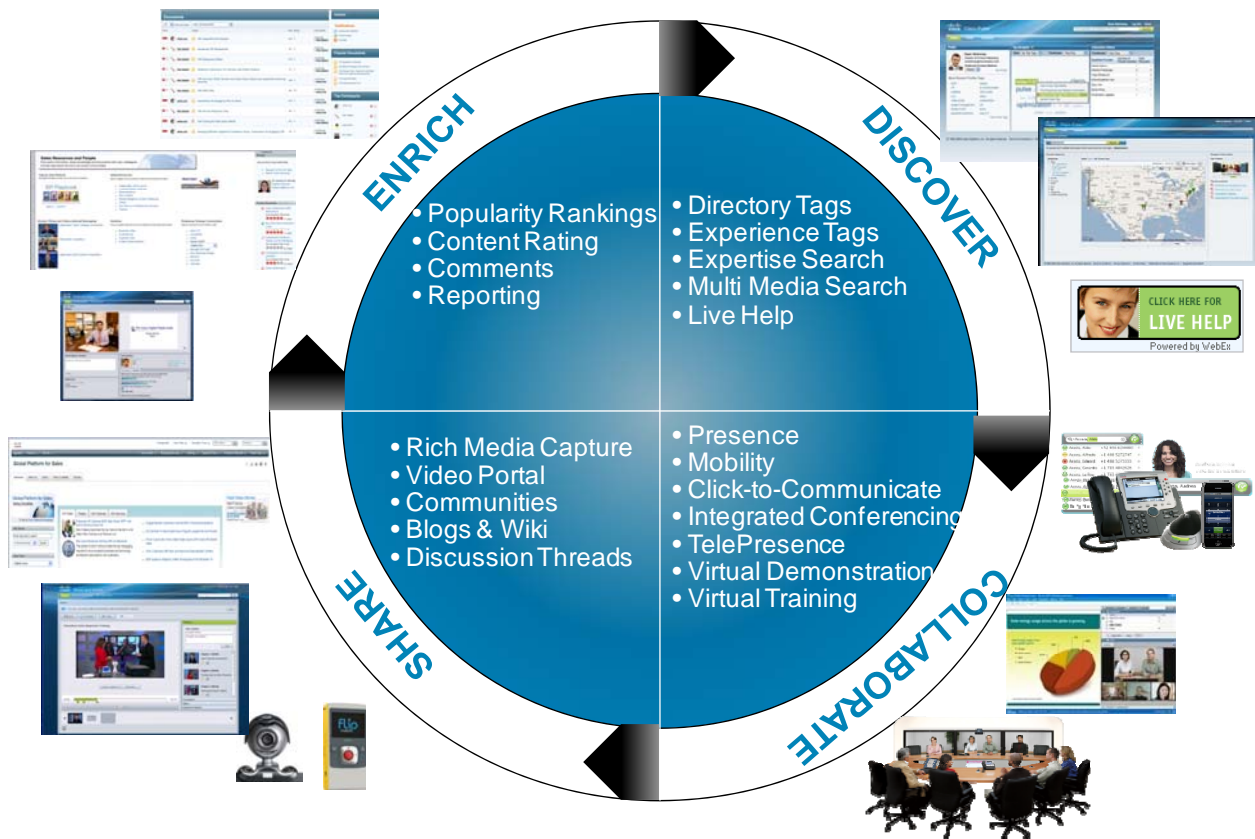
Perhaps the hardest changes Cisco had to make were in its sales culture. Cisco, like most other companies selling highly technical products and solutions, had in place an overlay sales team with product sales specialists and consulting systems engineers assigned to particular account managers in a specific area. These sales specialists and consulting systems engineers reported up to the sales manager over that area. The sales specialist, the account manager, the area manager, and the theatre manager all had sales quota to reach.

By implementing SOAR, some of the best sales specialists were virtualized, removing them from specifically serving a given geographical area and from the direct management chain in that area. Clearly there were misgivings about this as it would impact the ability for everyone in the sales chain to make quota.

Cisco handled this challenge by engaging and leveraging executive sponsors who expressed support for the program, created accountability to implement it, and linked its success to business objectives. Without this executive leadership, SOAR would have never got off the ground – it wasn't that SOAR's objectives were misguided, it was just that the immediate financial uncertainty to the sales team naturally caused concern.

To assuage anxiety at all levels in the sales organization, a pilot SOAR program was launched in the Commercial segment of the US theatre. The results that came back were highly encouraging. In the pilot region, travel savings rolled up to \$422 k per year while sales specialist time savings approached 720 days on an annualized basis. This allowed many additional customer touches which led to more engagements and additional sales opportunities. One of the sales specialists involved in the pilot achieved 160 percent of his quota and doubled the number of account managers he could support, and he was able to coach his son's soccer team, a personal lifestyle benefit that was not possible under the previous sales process.

Figure 4. Integrating collaboration technologies into the sales process optimizes sales specialist performance.



Technology Developed and Integrated for the SOAR Program

In Cisco's sales organization, overlay specialists play a critical role in creating new sales opportunities and in effectively pursuing sales leads. Cisco already had a full suite of communications and collaboration tools, and these were available to the company's overlay sales specialist teams. The big change with SOAR was in how these tools were integrated into the sales process. In addition to Cisco's already impressive suite of audio, video, and data collaboration solutions, Cisco also implemented an enterprise social software tool and a novel expertise locator tool, branded Cisco Pulse, which is designed to assist the sales expert virtualization process by using Google-like indexing technology to help locate sources of expertise.

Self Help Resources: To enable account managers to become more autonomous, Cisco deployed an internal enterprise social software solution that enabled creating a sales community consisting of personal profiles, wikis, and blogs (including voice and video blogs). This community also integrates with the presence and IM engine, as well as with the click-to-call/click-to-conference capabilities from Cisco Unified Communication Manager so that account managers and other sales personnel requiring community resources can instantly connect. The SOAR Sales Community provides account managers access to sales wikis (a knowledge base containing technical information), blogs from other account managers and sales specialists, sales presentations, competitive information, and links to training and online support demos. When additional information is required, the sales person can click on a TSN link and be routed via WebEx ACD (automated call distribution) to a virtual sales specialist.

Figure 5. The SOAR portal showing wikis and integration with the Technology Solutions Network.

The screenshot displays the SOAR-US Service Provider-Routing and Switching portal. The top navigation bar includes links for Log In, Cisco Sites, Navigation Tools, Emergencies, and a search field. The main content area is organized into several key sections:

- Left Navigation Menu:** Cisco Employee Connection, Theatres & Locations, Market Segment Theaters, SOAR, Training, News Archive, SOAR Canada, SOAR US Commercial, SOAR US Enterprise, SOAR US Public Sector, SOAR US Service Provider, Data Center, Unified Communications, Video, Security, Wireless, Optical, Routing and Switching, USSP AT Leaderboard, SOAR Inside Sales, and Contacts.
- Self Help Tools:**
 - Recurring Customer Demos:** Cisco Interactive Technology Workshop, Event Registration Calendar, Customer Event Invitations, Weekly Recurring Technology Demo's.
 - Router and Switching Tools:** Router and Switching Knowledge Wiki.
 - Locate a Customer Reference:** Customer Reference Database, Quick Start Guide (PDF - 170 KB).
 - Self Help Tools (Bottom):** Topic (Email Archive Search), vSearch (VODs & Presentations), Safe Harbor Program, Solution Reference Network Designs (SRND), Multi-Line Configurator & Dynamic Configuration Tool.
- SOAR Assistance:**
 - Locate An Expert:** Expertise Locator tool for finding specialists.
 - Immediate Assistance:** Live Help chat powered by WebEx.
 - Follow-up Assistance:** Email request form for specialist assistance.
 - USSP IT:** USSP IT section.
 - TSN Portal:** TSN Portal link.

Cisco found that one of the issues with creating blogs is getting a sales specialist to stop doing other things long enough to compose a blog entry. The company built a video blog creation tool, now branded Cisco Show and Share, which allows specialists to use a Flip video camera, Cisco TelePresence recording, or a regular web cam, and in very short order create a video blog.

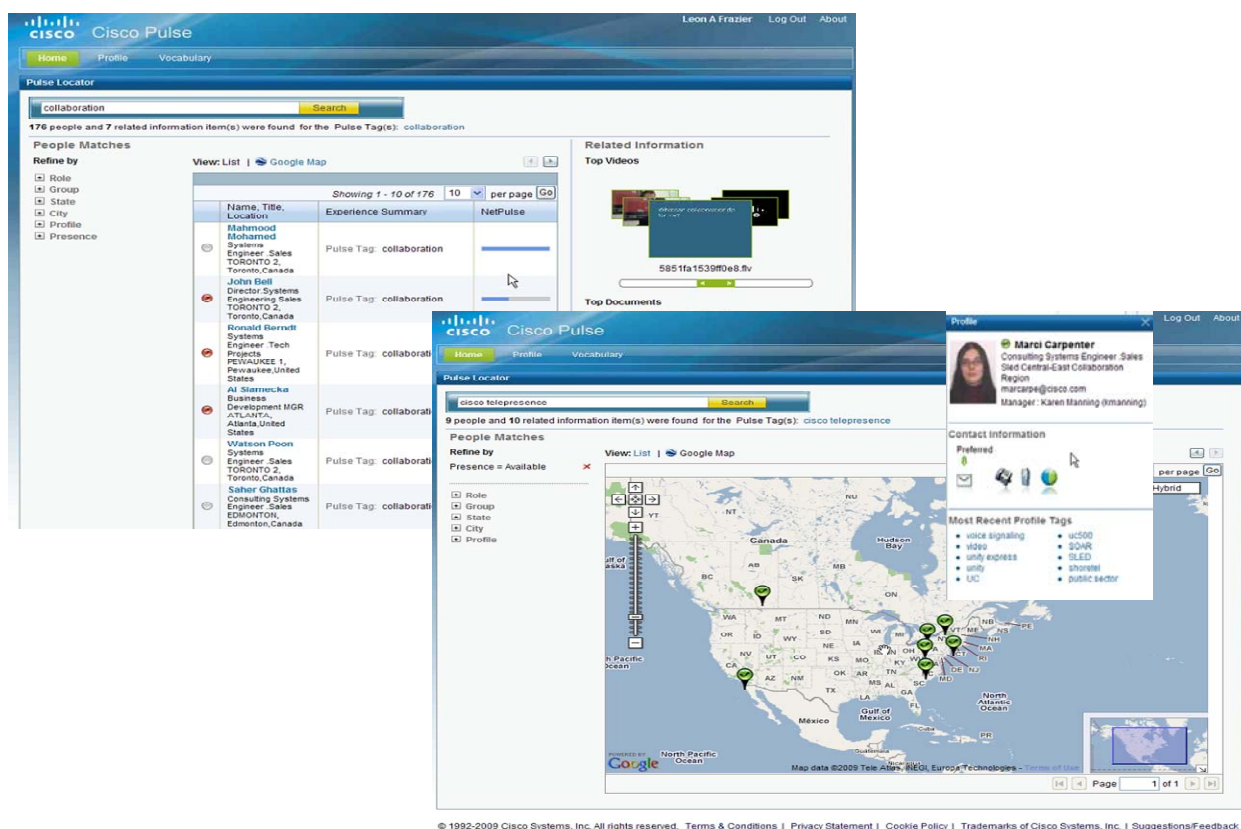
What makes this capability highly useful is that when the video blog is completed, the audio is sent to a speech-to-text engine as part of the storage process so that the video blog can be indexed and searched like any other blog entry on the site. Video blogging saves sales specialists significant time versus text blogging! Cisco Show and Share also allows simple video editing, scene transition, slide upload and synchronization, rating, and in-line commenting resulting in an enterprise class social software solution.

Help with Tactical Issues: A key function of the SOAR portal is to provide account managers access to resources that can help with tactical issues, since they no longer have a dedicated sales specialist. Access to the Technology Solutions Network is embedded within the SOAR portal. The TSN is essentially a global internal help desk staffed by sales engineers that can help account managers with RFP reviews, pricing issues, bills of materials, technical questions, and so forth. The SOAR portal displays a “Live Help” button, and account managers can click on that button to get real-time live support from a Technology Solutions Network sales engineer. The Technology Services Network is supported by Cisco WebEx’s ACD capabilities which route support requests to the next available sales engineer with the right skill set to best provide the needed support. When the sales engineer responds, the account manager and the sales engineer can instantly begin a collaboration session using the WebEx toolset. Like any well run help desk , each case is tracked using a case-management tool.

Real-Time Help with Highly Technical Issues: Routine requests can usually be handled directly by the account manager and a sales engineer through the SOAR portal; however, should an issue arise requiring specialized knowledge, account managers or sales engineers can immediately contact a virtual sales specialist, bringing the specialist into a customer meeting using Cisco WebEx Meetings. Virtual sales specialists all have web cameras attached to their personal computers, so that along with voice and Web conferencing, customers can have the intimacy and immediacy of seeing the sales specialist they are talking to. Account managers are also equipped with web cameras so that the sales specialist can see the customer.

Finding Expertise using Cisco Pulse: In most sales organizations, account managers personally know a few specialists that they can reach out to if they have a question or when customer issues arise. By virtualizing the sales specialists, Cisco had to create a way for account managers and sales engineers to find the best expertise when they did not know who to call. This need intensified as sales specialists began crossing vertical market boundaries.

Figure 6. Cisco Pulse helps account managers and sales engineers find the best specialists.



To address the expertise locator issue, Cisco developed Cisco Pulse, a network-enabled infrastructure platform capable of examining in near-real-time the traffic people send over the network and automatically indexing or tagging this content based on a specific lexicon. This traffic can be emails, instant messages⁶, wiki entries, blogs, documents, presentations, PDFs, and even video. Cisco Pulse is able to use this meta data to rank an individual's profile by tracking how often a sales expert uses keywords in his or her communications as well as how often other sales people look at content (documents, presentations, text and video blogs) created by the sales expert. In a sense, Cisco Pulse works like Google search, ranking specialists that use relevant keywords more often and content that is looked at most frequently at the top of a search response.

Cisco Pulse provides on-ramp to collaboration using Cisco's Collaboration products. These tools give account managers an automated expertise location solution with instant collaboration enabled. Pulse will soon be integrated with Cisco's new Enterprise Collaboration Platform team space (which replaces an older, third-party social software solution), automatically listing shared workspace documents, videos, and other helpful online information that a person seeking expert material may need.

⁶ Analyzing instant messages is on the roadmap for Pulse. In the first release, it does not examine IM's.

Within the SOAR program, Cisco Pulse has been mashed up with Google Maps so that when a search for expertise is made, the account manager can bring up a map showing where the currently available specialists are physically located. There are times when knowing that a local resource is available helps close a deal: although sales specialists are contacted virtually, they can still go to customer sites when needed.

Virtual Demos: Before the SOAR initiative, account managers regularly brought sales specialists to customer meetings asking them to give relatively basic demonstrations. Under the SOAR program, specialists schedule regular product demonstration sessions, and any account managers and prospective customers who wish to attend can join these sessions remotely using Cisco WebEx Meeting application. When the demonstration is over, virtual sales specialists are available to meet with individual account managers/customers to respond to questions and to resolve issues. Making this simple change by doing demonstrations virtually has saved countless hours of travel and expense.

Using Telepresence: There are some instances when a Cisco WebEx Meeting is just not intimate enough. For high profile meetings, account managers and sales specialists have access to Cisco TelePresence suites where they can meet with customers in a comfortable conference room with life sized, high definition images, which gives the impression that they are in the same room. These meetings need to be scheduled in advance, and the virtual sales specialist goes to the nearest Cisco office with a telepresence unit while the customer either uses his own telepresence unit or goes to a local Cisco office with the account manager.

Results from the Virtualized Specialist Sales Force

Cisco sought specific improvements from the SOAR initiative. SOAR's goals versus the program's results are summarized below.

Table 1. Goals versus results of the virtual sales specialist initiative.

SOAR Goal	SOAR Result
Significantly increase customer face time	Across the board, virtual specialists increased customer interaction 40 percent. Some saw a 100 percent increase. Certain specialists saw a 2x or 3x increase.
Lower the cost of sales	Travel costs for sales specialists decreased 50 percent globally. At \$550 per trip, this equates to millions of dollars in sales cost savings.
Provide more sales specialist accessibility to customers	Cisco account managers reported a 17 percent increase in getting the right specialist in a faster period of time.
Scale the sales specialists	For every five virtual sales specialists, Cisco saves the cost of one local specialist. Some specialists report that they have gone from supporting one or two account managers to supporting five to eight.

Significantly reduce the tactical work sales specialists do	This function was offloaded to lower cost sales engineers and to the self help SOAR portal. Offloading is not 100 percent due the technical nature of Cisco's products and services, but much of the tactical burden has been removed from sales specialists.
Increase job satisfaction and enable a better home/work life balance for these highly skilled and expensive resources	78 percent of the virtual specialists indicated that the SOAR initiative improved their productivity, improved their business performance, and their quality of life.

Additional benefits Cisco gained the virtualized sales specialist program include:

1. Cisco management reports that SOAR has thus far reduced the sales cycle time by 5 – 7 days, thus increasing sales as well as sales capacity.
2. End user customers and partners who interacted with virtual specialists gave a user satisfaction rating of 4.8 out of 5.0.
3. Customers reported that getting the right resource faster using virtual specialists was better than having to wait days or weeks for a face-to-face meeting with a dedicated sales specialist.
4. Sales success by the virtual specialists (meeting/beating quota) encouraged even greater adoption of the technologies which is driving further innovation and productivity gains.

Moving SOAR Forward within Cisco

The virtual specialist program began as a pilot in four US mid-market areas and one Enterprise region. The initiative was so successful that it was rolled out across all regions and all Cisco verticals in the United States and Canada in 2009.

Beginning in fiscal year 2010 SOAR is being rolled out globally across all Cisco theatres. In rolling out SOAR, internal Cisco SOAR consultants provide the sales theatre managers with a menu of SOAR solution elements and options since there are parts of SOAR that can implemented more easily. Thus, rather than requiring each theatre to do a “big bang” SOAR deployment, individual theatre managers can choose those SOAR technology components and process changes that will rollout easier and more quickly in their geographies and cultures with the understanding that the entire program will eventually be incorporated.

Rolling the Benefits of the Specialist Optimization Program Out Beyond Cisco

Cisco's channel sales organization is adopting the SOAR program for use with Cisco's channel partners. While the fundamentals of SOAR for the channel sales organization are identical to those of the direct sales group, there are some variations. One of the benefits of SOAR is that as the sales processes and culture changes are addressed, the rich set of technologies supporting them can be customized as necessary to provide significant flexibility.

SOAR has been so successful within Cisco that the company is packaging the core SOAR processes and technologies into complete solution offering. Cisco end user customers will soon be able to have Cisco or a select Cisco solutions integrator work with them to replicate SOAR-like capabilities within their own organization so that they can obtain optimized sales results similar to those Cisco has achieved. The entire package will include process consulting and engineering, technology solution sales, deployment and integration services, and change management consulting.

Lessons for Sales Executives from Cisco's SOAR Initiative

Changing the sales organization's method for accessing specialist expertise from a physical presence model to a virtual model is clearly challenging. Many lessons have been learned from Cisco's experience rolling out its Specialist Optimization and Access Results program.

Cultural Lessons

Of all the issues faced, culture was probably the toughest issue encountered when trying to roll out the SOAR program.

1. Executive sponsorship is a must. Large sales organizations have significant inertia, and changing direction often requires the appropriate application of strong leadership to align company vision with individual department or group objectives.
2. It is important that the sales organization acknowledge that issues, like those SOAR solves, are real for them. Executive leadership can help this happen. Making sure the sales organization owns the problems SOAR can solve is a key success component.
3. Selling the program at all levels of sales management is critical. One of the challenges is helping sales managers understand that by virtualizing sales specialists everyone gains; they should not look at SOAR as if they were losing control and access to resources.
4. The benefits must be clearly articulated. Cisco did a controlled pilot in several regions before doing a wider deployment. An important part of any pilot is identifying in advance the criteria for success, what will be measured, and how the measurements will be taken. This makes the pilot program more objective.
5. There will be ingrained cultural issues that must be addressed. Part of these can be overcome with executive leadership, but executive leadership must be augmented with solid programs and metrics. A sense of "we are all in this together" should be fostered.
6. Account managers will be resistant to this change. Sales engineers and managers must toe the line and be firm about how the virtual specialists program is to work.
7. Require the account managers and sales engineers to carry video with them via a simple web cam. The use of video with the customer in the virtual specialist program has proven extremely beneficial.
8. For some account managers, it is disconcerting not to have a sales specialist in the next room or with them in the sales call. Recognizing this challenge and addressing it proactively will help the sales team embrace the change.

9. It took Cisco approximately six months to change the culture and get the program up and running effectively in the US and Canada. Managers must realize that process and cultural changes do not occur overnight.
10. There will be cultural differences between geographical regions. The virtual expert program must be allowed to be adaptable to these cultural and geographical differences.
11. Virtual specialists must be assured that their jobs are not being marginalized. Some specialists initially expressed sensitivity to this issue.

Compensation Lessons

Change is hard for many people, particularly when personal compensation is at stake.

1. The compensation model for shared virtual specialists will need to change.
2. Because they are shared resources, virtual specialists need to be compensated for “helping”. This needs to be part of everyone’s performance objectives.
3. Some virtual experts will be 100 percent shared and some may be only partially shared. Compensation models must be flexible enough to allow for full and partially shared virtual resources.
4. Virtualization targets must be established (i.e. time spent in front of customers) and tracked. These targets then must tie back to the virtual specialist’s compensation and the virtual specialist’s manager must use them in performance reviews.
5. Cisco found that certain types of fun contests and events were important to help virtual experts want to be in the program and make it excel.
6. Publishing success stories drives the specialists to achieve more. For example, publishing how a specialist achieved 160 percent of quota by working with more account managers was a huge proof point to bolster the performance of the other specialists.
7. Everyone up and down the management chain, including the executive sponsor(s) must be held accountable for the success of the virtual specialist program. No one is exempt from the benefits of success or the consequences of failure.

Customer Visit Planning Lessons

1. Virtual specialists should expect to have more “mini planning” meetings with account managers than they would if they were physically located in a region. Virtualization also causes the account managers to do more planning.
2. When possible, the virtual sales call should be planned with the account manager in advance. Although some meetings are ad hoc, the planning helps the virtual expert and the account manager coordinate and sync their presentations and comments.
3. Having access to all of the virtualization tools allows account managers and virtual experts to have more strategic planning versus simply tactical planning.

Technology Lessons

1. The Cisco technology works as advertised; the key is getting the process changes and cultural changes in place so that the technology can be tailored to support them.
2. If you want to have maximum impact across the organization, you can't just buy the technology. You must be willing to change the sales culture and processes that the technology is designed to support.
3. There may need to be additional localization services to take the best information from the SOAR team space in one theatre or language and make it available in another. This is particularly true of audio and video information. In its initial global rollout, Cisco will be creating a separate shared SOAR workspace on a geographical theatre basis until it has more experience with the issues of trying to scale virtual specialists across theatres.
4. An expert identified by the expert locator tool, Cisco Pulse, may not be able to converse fluently in theatres in which a different language is spoken.
5. Sharing, capturing, and storing information must be easy. It must be easy for a specialist to make a blog or video blog, for example, to capture key ideas and success strategies.

Conclusion

Many organizations selling technically sophisticated products and/or services use overlay sales teams to provide expert resources to account managers. Experts are a critical factor when pursuing a sales opportunity, and they remain important throughout the sales process until the deal is closed.

Given the importance of the sales specialist in the sales process, most companies struggle with how to match the best specialists with the best opportunities. They also struggle with how to leverage expertise globally when current overlay sales processes require local specialists. As companies try to grow revenues, they must also try to find ways to scale the scarce expertise the sales specialists possess.

Using its broad collaboration portfolio, Cisco has developed a repeatable methodology for virtualizing sales expertise that can both accelerate a high performance sales team and scale the company's available sales specialists. SOAR requires both cultural and sales process changes to be effective. To support these changes, companies emulating Cisco's methodology will likely require technology updates to best enable the sales optimization specialist initiative.

Cisco's methodology is particularly applicable to organizations selling complex products or services. These organizations need to really focus on broken or inefficient sales process in order to determine how they could really gain from their own sales expert optimization

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*Carl Wiese
VP, Global Collaboration Sales
Cisco Svstems*

initiative. As sales optimization drives significant sales productivity increases, it creates a compelling return on the technology and solution investment.

Companies do not need to implement all of the sales expert optimization process changes or all of the underlying technology in one “big bang” rollout. These processes and technologies can be layered so that companies can start with straightforward improvements like virtual demos using Cisco WebEx Meeting applications and evolve as the processes and support technology evolves to Enterprise Collaboration Platform for shared sales team workspaces, technology for specialist help desk and skills-based case routing using Cisco WebEx ACD, and eventually to a full virtual sales specialist environment with expert locator tools using Cisco Pulse. As companies move toward more expert virtualization, they should assure that video is available to convey the image and intimacy of the sales specialist right into the customer premises. This can be done using Cisco WebEx Meeting via web cameras or using Cisco TelePresence solutions as opportunity permits.

Process coaching is available from Cisco’s services group. The virtual specialist technology is available from Cisco’s product sales group. Cisco is combining its sales expert optimization process coaching services and virtual expert technology into a packaged solution for partners and customers so that they can create their own high performance virtual sales teams.

About the Author

E. Brent Kelly is a Senior Analyst and Partner at Wainhouse Research specializing in unified communications applications and enabling infrastructure. Brent has authored numerous reports and articles on unified communications including mobile unified communications solutions, detailed reviews of Microsoft’s UC strategy as embodied by Office Communications Server, IBM Lotus Sametime and IBM Lotus’ UC² Strategy, and Telephony-Based Unified Communications, which is a thorough description of PBX vendor unified communications offerings. He has also written reports about migrating to IP communications, video network service providers, and the collaborative reseller channel. Dr. Kelly has authored articles for Business Communications Review Magazine, NoJitter.com, and he has taught workshops in North and South America, Europe, and Australia as well as at major industry events such as VoiceCon. With over 21 years experience in developing and marketing highly technical products, Brent has served as an executive in a manufacturing firm where he developed and implemented a manufacturing, marketing, and channel strategy that helped land national accounts at major retailers. Previously, he was part of the team that built the devices Intel used to test their Pentium microprocessors. He has also led teams developing real-time data acquisition and control systems, and adaptive intelligent design systems for Schlumberger. Brent has worked for several other multinational companies including Conoco and Monsanto. Dr. Kelly has a Ph.D. in engineering from Texas A&M and a B.S. in engineering from Brigham Young University. He can be reached at bkelly@wainhouse.com.

About Wainhouse Research

Wainhouse Research, www.wainhouse.com, is an independent market research firm that focuses on critical issues in the Unified Communications and rich media conferencing fields. The company conducts multi-client and custom research studies, consults with end users on key implementation issues, publishes white papers and market statistics, and delivers public and private seminars as well as speaker presentations at industry group meetings. Wainhouse Research publishes a variety of reports that cover the all aspects of rich media conferencing, and the free newsletter, *The Wainhouse Research Bulletin*.

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