Using the Build Your Own Reports (BYOR) Module

Case Study

Tour de Force
Enterprise Software Solutions
Be Efficient. Be Effective.

Kelsan, Inc.

Overview of the CRM Engagement Report

- Customer Since 2012
- 75 Users
- Infor SX.enterprise ERP

Kelsan THINK CLEAN
Distributor of Equipment, Packaging, and Sanitary Products Since 1950

Location
Headquarters - Knoxville, TN

Industry
Janitorial and Sanitation Products Distributor

Website
www.kelsan.biz

Blaine Keller - CRM Manager: "The CRM Engagement Report is a rolling 7 day count of not only sales based activities, but also every time a rep modifies an Opportunity, creates an Appointment, or has a Task scheduled due.

When I took on the role of CRM Manager at Kelsan in 2012, I had a conversation with our CEO, Ken Bodie. I explained my preliminary findings in the field when it came to the company's current Customer Relationship Management system, Sales-i: we're in deep trouble. Our reps were using everything from 3rd party CRM programs like the free Salesforce & ACT to more traditional ledgers and notebooks to cocktail napkins wadded up in the dashboards of their cars. Out of 31 Outside Sales Reps, 1 used Sales-i CRM, the system the company paid for to make the organization better. If every licensed CRM User does not Use the CRM, then the whole company suffers. Some would call it the "weak link theory," I call it: "you cannot see past your own needs to the company's needs entire."

It takes no stretch of the imagination to realize nothing flowed into the company from sales calls in the field. Without a comprehensive CRM, Kelsan's customers were not Kelsan's customers - they had become the sales force's customers. A company operating like this is destined to fail in the modern distribution world. Sales reps, like all human beings, resist change when it is not in their self-interest. We rolled out Tour de Force (TDF) roughly a year ago, and only since BYOR has Kelsan achieved admirable increase in Activities, not to mention other metrics in my report. Getting people to put their notes into TDF by means of "buy-in" or "what's in it for me" has been like getting children (who can use iPads actually better than some of my team) to brush their teeth by offering them candy to do so: annoying, taxing, and ultimately ineffective. At some point, people must be told what to do for the greater good of the business whether it fits their routine or not. Clear orders can outweigh the satisfaction of autonomy by **eliminating the stress of questioning,** "what should I do in TDF?"

For the last two months, I have been on a whistle-stop tour of Kelsan's districts in Nashville, Knoxville, Chattanooga, and Charlotte. I meet with each TDF User twice a month to make sure they are:
1) Creating Activities with our high-value targets and buying accounts
2) Adding contacts wide and deep: from Receptionist to CEO
3) Keeping an up-to-date Opportunity pipeline with the customers and targets from point #1

I enforce this vision for success with the CRM Engagement Report. My "A" players, those who follow the above criteria, climb higher on the list the more they engage CRM: not just logging activities but also doing other meaningful activities. Activities alone are not the measure of success: Appointments, Opportunity Pipeline updates, and Recurring Tasks all make a successful user.

Despite the tone of my prose, I'm not a jaded monster: I understand people have lives outside of work and delays happen. With my report though, if a rep fails to engage TDF before they meet with me, the rep can see what they need to accomplish to be seen as a good TDF User, and at Kelsan, if you aren't a good TDF User, you are not an "A" player. This report makes that more obvious than Activity count or Pipeline $ amount on their own.

And one more thing...

I publish everyone's CRM Engagement to each TDF User. That's right: through BYOR Viewer, using TDF is now a transparent part of Kelsan's culture - the sales reps now hold each other accountable and are beginning to self-regulate when someone "falls off" my report, which means they have not used TDF in the last rolling 7 day period."

Rolling 7 Day CRM Usage
Sales Force

	ActivityID
36-Ken Mahoney	27
48-Derrick Nava	15
06-Tony Whitson	14
22-Pete Hammond, Jr.	13
18-Jim Bales	10
38-Gary Hubbs	10
74-Fred King	8
72-Program Accounts	7
!Charlotte Prospect	7
G2-Mike Petrea	7
K4-Drew Ensor	6
D8-Mandy Suker	6
N6-Allen Newcomb	6
V2-Billy Dyer	6
N2-Michael Holbrook	5
N3-Kyle Harris	5
52-Randy Moore	5
E8-Tim Hyman	4
C4-Wade Curvin	3
C5-Charlotte Store	3
!Program Account Prospects	2
10-Brandon Haun	1
43-Available	1
44-Jason Toole	1
34-Michael Holmes	1
A0-Charlotte House Accounts	1
E4-Brian Trice	1

	ApptmntId
D8-Mandy Suker	5
V2-Billy Dyer	4
K4-Drew Ensor	3
44-Jason Toole	3
48-Derrick Nava	3
38-Gary Hubbs	2
G2-Mike Petrea	2
74-Fred King	1
!Charlotte Prospect	1
06-Tony Whitson	1
10-Brandon Haun	1

	ModDate
C8-Joe Campbell	15
48-Derrick Nava	9
N2-Michael Holbrook	8
72-Program Accounts	8
V2-Billy Dyer	7
44-Jason Toole	7
E8-Tim Hyman	5
74-Fred King	4
!Program Account Prospects	3
38-Gary Hubbs	3
N6-Allen Newcomb	3
D8-Mandy Suker	2
G2-Mike Petrea	2
06-Tony Whitson	2
N3-Kyle Harris	2
N4-Kimberly Eisler	2
22-Pete Hammond, Jr.	2
10-Brandon Haun	2
R6-Danny Greene	1
43-Available	1
C4-Wade Curvin	1
H6-Rick Corbitt	1
Y0-Nashville House Accounts	1
!Knoxville Prospects	1
K4-Drew Ensor	1

	TskId
36-Ken Mahoney	12
52-Randy Moore	1
C4-Wade Curvin	1

Kelsan CRM Engagement Report