Phase One: Building Entity File

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Jordan

Card Me! Contest

Ask employees to collect business cards
Include clients, suppliers, any with business dealings

Employee writes his/her name on the back of card
Drops into a "fish bowl" back at the office

TWO WEEK CONTEST	ONE MONTH CONTEST
Card is drawn out of bowl Employee wins prize Business card (contact) wins	Same as two week Prize is 1/2 the value

Encourages employees to get cards in quickly (better prize)
Incents client (etc.) contacts to give a business card (prize)
Builds a primary "connection" between employee and company contact
Company can "rate" level of contact based on when it was "dropped in"

accurately scan and read card

every card gets assigned a "connector"
will need to be added manually at time of card scan

recommend CardScan
http://www.cardscan.com/index.asp

can be set to de-dupe

reader will put extra info here
nice to have, not a must have

Digital Address Book

Primary Contact

Name
Title
Company
Address (2 Line)
Phone
Fax
Email
Web Page
Other
Logo image

Exact Matching
BP Texas City Refinery
BP Texas City Refinery

Statistical Matching
BP Texas City Refining
BP Texas City Plant

Record Linkage

Exact Matching or Statistical Matching
Name & Company fields (maybe zip)

Financials System

Name/Address
Vendor or Client?

Unique Identifier
(usually assigned by system)

Billing Relationship Info

Billing Information

Types of Products

only want to pull unique id
do not want financials in two places
+ financials continuously update and change
Make an "ID" call to financials at time of reporting

great for sales system
measures penetration by product
identified "opportunistic" products (future revenue drivers)

no $$!

Contact Info | Financial ID
....
....
....
....

no match possible?

Contradictory Names

Manual Intervention:
British Petroleum Texas City Refinery
BP Texas City Refinery

only texas and city and refinery match
too many refineries to draw conclusion

need near-term results
clients need new solutions
clients care more about salesperson than product

protect the firm's brand
promote a complex package
selling is dangerous if applied wrong

outcome	SYSTEM TYPES	behavioral
little supervision and few managers		greater supervision and many managers
little contact with management		high contact with management
decentralized and informal		centralized and formal
TEAM MEMBER TYPES		
superb at individual selling		more team oriented
stronger sense of motivation/accountability		weaker sense of motivation/accountability
take client's side at expense of mgmt		mgmt viewpoint while balancing client needs
independence of mind		more cooperative with management
less emotional loyalty/more likely to leave		more emotional loyalty/less likely to leave

Transactional — **Consultative**

salesperson chooses entity from list
new clients or targets need to be added to master entity table

outcome control
more about managing metrics
versus managing processes

Assign Clients
1-1 for salesperson
Use primary connectors

Classify and Cluster
Client or Suppler (etc.)?
Industry Type
Other Attributes?

Master Entity File

Administrator Interface to Update Entity Database

Edit existing entity
Add new entity
Delete entity

Administrator Interface to Update Asset Database

Add assets (trucks)
Edit truck attributes
Add/Edit asset productivity #s

Asset Usage Data

some systems (automatic vehicle location devices) offer additional data points

truck id	vehicle location	time of arrival	time of departure	idling time	engine on	engine off	etc...
truck id							
truck id							
truck id							
truck id							
truck id							
truck id							
truck id							
truck id							
truck id							
truck id							
truck id							
truck id							
truck id							

time stamps

location information in the form of latitude and longitude coordinates

Phase Two: Mobile Asset Management

asset productivity when you cannot "see" the assets

can be used to reduce risk of vehicle theft

system requires each driver carry a cell phone

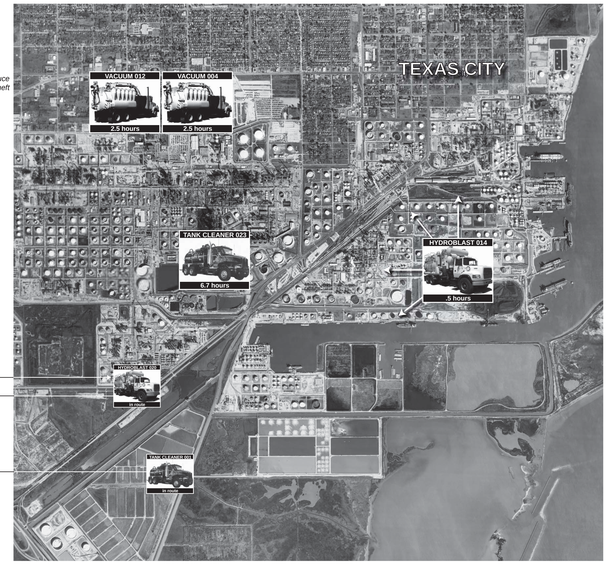
NEXTEL
i275
i355
i710
i730
i670
i950
i920
i870
i560
i760
i930
i836
i860
i355
i325 IS
i605
BlackBerry 7100t

GPS tracking software loaded on each cell phone

real-time tracking
no monthly charges
records user information
flexible XML format (reporting)
open api for developers

can also be enabled to track excessive speeding "extended" breaks can be monitored and mitigated

using gps-enabled phone
activate tracking software on handset
phone gathers stats regularly
reports back to web server at regular intervals



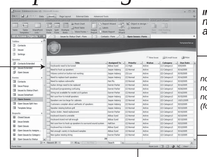
recently possible because of available geospatial datasets (like Google Maps)

can overlay aerial imagery (as picture shows) that will show refinery and plant details
-- or --
can use regular mapping data

can also overlay things like weather or road conditions (construction)

can be used to plan "optimal" routes and schedules for trucks already in the field (and/or) can be used to plan routes in advance

Pipeline Mgmt.



IMPORTANT:
not recommending contact and activity management for first phase

not crm system (yet)
not business process redesign
no business function automation
(foundation for structured system, if needed)

Relationship Data

Sales Force Management

INITIAL RECOMMENDATION:
Individual Excel spreadsheets
"Draft" mode for most of week
Menu option automatically submits to system
Data is rolled up into a single report

goals can be manually audited

Team-based Goals	Weekly Email: My Results / Overall Team Results
Individual Goals	Weekly Email: My Results / John Doe's Results / Jane Doe's Results

(or) *(or)*

Weekly Email: Detailed Results

highly recommend "pipeline visibility"

all deals sorted by results
salesperson name associated with each record in report

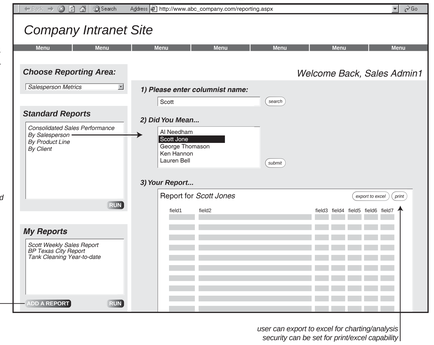
same goals for all team members
unless driven off financial performance only
recommend changing one of the goals each quarter

SECOND OPTION (bit more expensive):
Use Microsoft Access database
Individual copies on each desktop
Single database for all sales persons
Requires "connection" to network to use

THIRD OPTION (bit more expensive):
Web-based solution with authentication
Users update contacts and activities

FOURTH OPTION (more expensive):
Buy small off the shelf package and customize
Simple package that can be customized quickly
Note: *This is not Salesforce.com, Siebel, etc.*

Management Reporting



user can export to excel for charting/analysis
security can be set for print/excel capability

Report Creation

users can build custom reports without IT help
user selects appropriate fields, decides on filters/prompts
user give new report a custom name and saves

user can set a "prompt" so each time report is run
user is prompted to enter columnist's name
(prevents needing a similar report for every columnist

recommend starting in excel and going straight to mobile solution can go from excel to web-based also

excel to start allows for methodology to be defined and quickly edited with very limited cost outlay

recommend only 3-4 metrics to begin with
more important to build momentum (mass x velocity)
called the "flywheel effect" (Jim Collins)

Note: sales professionals can upload "draft" work throughout the week
system can be set to "close books" at a certain time each week

not take more than 10 min to complete
focus=selling, not paperwork

report on breath
assume depth
(trust, yet verify)

system can track targets and clients

Book of Business
UPLOAD TO SALES SYSTEM
Business Developer: Scott Jones

	metric 1	metric 2	metric 3	metric 4	metric 5
client 1					
client 2					
client 3					
client 4					
client 5					
client 6					
target 1					
target 2					
target 3					
etc...					

Example Metrics....
Number of Sales calls
Percent to Revenue(Sales) Goal
Revenue gains
Number of opps in pipeline
Number cross-sell opps
Number opps at each ***stage***
Number clients managed
Percent contacted in last week
Number of "high value" leads
Deal wins and losses
Opps by product line
Percent proposals result in sale

Web-based Pipeline

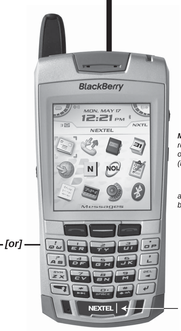
sales pipeline
activity management
contact management

Web-based News

portfolio news & search

can use treo (windows or palm) or smartphone technology
recommend standardizing sales team on one phone
(but not necessary... just one platform)

[or]



Mobile Sales Force Application Benefits
real-time: more responsive & market-facing
optimize the efficiency of sales resources
(bring in information from the field faster)

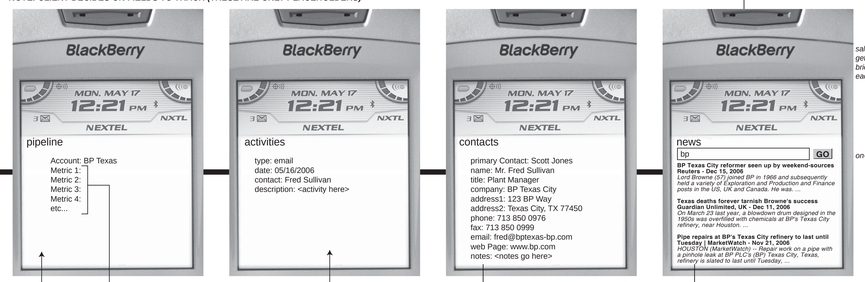
at some point, product data can be put in system
business developers can access during sales calls

recommend using nextel
can activate gps tracking
use in combination with asset tracking

many mobile benefits include:
calendaring
instant messenging
email
(all in addition to acct. mgmt.)

Phase Three: Account Management

NOTE: CLIENT DECIDES ON FIELDS TO TRACK (THESE ARE ONLY PLACEHOLDERS)



company defines the metrics
recommend only 3-4 to start

salesperson can get a quick news briefing before each sales call

on-demand searches

[or]

saved searches

portfolio news GO

exxonmobil
alon usa
conocophillips
lyondell-citgo
motiva enterprises
quantum services
hydroblasting
environmental services
gulf of mexico refinery

can load company news

can load by keyword

default view can by most recent news for entire portfolio

Analysts: Oil prices will hover near highs
Bryan College Station Eagle - 1 hour ago
... and ConocoPhillips - are expected to earn more than $68 billion in 2007, or 4 percent less than in 2006, according to estimates from analysts surveyed by ...

Energy to enjoy strong but softer 2007
My Desert Sun News Net - 3 hours ago
and ConocoPhillips - are expected to earn more than $68 billion in 2007, or 4 percent less than in 2006, according to estimates from analysts surveyed by ...

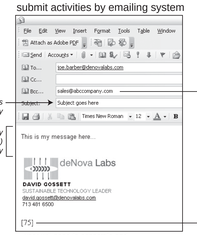
Logistics key challenge for ME petrochemicals
North Africa Financial Network, Jordan - 9 hours ago
... ExxonMobil Chemical Company President, Michael Dolan, also spoke about the technology challenges facing the petrochemical industry. ...

MENU:
add contacts
manage contacts
delete all

portfolio news can be emailed each morning

to both outlook (or notes) and mobile (blackberry) device

submit activities by emailing system



subject becomes headline of activity

everything in body (above signature) becomes activity

business developers can bcc (unknown to sendee) and contents of email gets submitted as an activity

business developer adds brackets at bottom of email below signature line with client or target "id" inside the brackets

user will need to associate and memorize codes for each account (or keep a list handy)

DSGN	David Gossett	DENOVA LABS	SALES + ASSET
PROG	Jean-Carlos Jaimungal	SALES FORCE ASSET MANAGEMENT	
DATA	Mark Lacerda		
WEB	Zach Altneu	DESC	Sales force automation built on top of client relationship management (upsell opportunities) and asset management (tracking what's selling); ultimately becoming a mobile sales force application that is responsive and market-facing.
HRDW	Jeff Renton		
APPR	Joe Barber		
DATE	15-DECEMBER-2006		
COMP	VERSION 1.0	SIZE 36 / 54	CODE DNL EVE
		DRAWING NO	DNL.EVE.1.APP
		ARCH	David Gossett
DEVELOPMENT PURPOSES ONLY		SCALE	SPEC CAD Plotting SHEET 1 OF 1

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