



Campaign vs. Process

Process: a repeatable sequence of events that produces a predictable result. Campaign: series of military operations and aggressive actions for a specific objective that flex depending on the enemy's capabilities and responses, and other unforeseen circumstances.

Which do you think fits in the sales environment better?

An excellent Pre-Sales manager told me once to just follow the sales-process, it works all the time. My response was "this time, things are different" but I had nothing written down, no facts to substantiate my instincts, and caved-in to his confidence. The outcome is not as important as my sense of loss-of-control of my sales campaign. My reflection at the time was "if this job is so routine, then get some else to execute it mechanically and see what happens." If I were a pilot, accepting the navigator's guidance as routine, could be a mistake. The path is never routine in sales, even if the ground to be covered looks familiar.

We generalize the selling activity into a process for two reasons:

- 1) To capture the essence of the wide range of campaigns so as to pass on a concise recipe for sales success.
- 2) CRM systems need a sales-process with distinct steps to indicate the status of an opportunity for management's view of the pipeline.

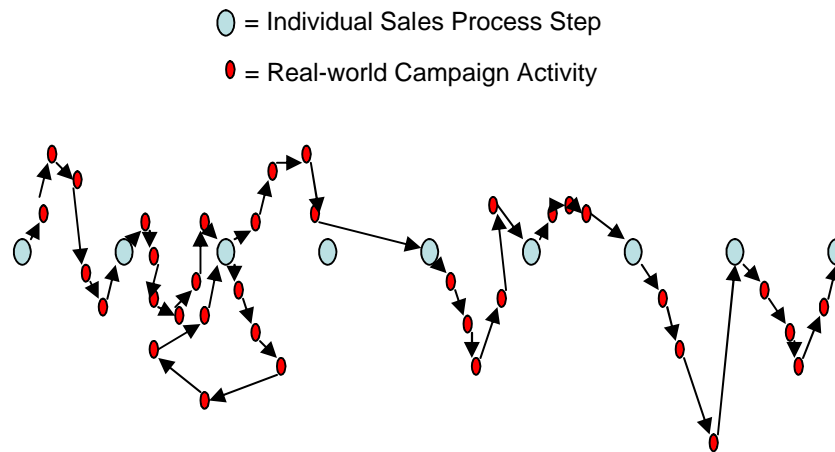
Sales management likes the "sales-process": it is distilled from their experience and their view of reliable selling activities for that company/product/market. It is easy to talk through and to document for enterprise systems. Non-direct selling professionals can look to the sales-process to judge sales professional behavior (aligned with the sales-process or not) in order to predict sales success and therefore deployment of precious resources. Sales teams can know what to expect, "be on the same page" with the rep, they think.

Some companies document the sales-process, give it sub-headings, indicate sample litmus-tests for determining a match with the actual campaign in question, and provide descriptions of things to do at this and that stage, and then print/laminate it for "quick" reference or embed it in a sales training course. Flexible? Realistic?

It is rare to see a rep with the laminated selling reference card at the ready. During account reviews, managers remind reps of the sales-process as potential next steps in their planning. "What step are you really at?" is asked. "Have you done the steps we agreed are required to be at that stage?" CRM systems provide dropdown menus to offer the sales-process steps and require the rep to select one. Reps guess at which sales-

process step describes the status of their accounts, and of course, no account fits the stage indicated perfectly because the previous steps are not in concrete, they are dynamic also. One day, a sponsor is supportive; next day the same executive has a new job. As the campaign moves on, some steps need to be revisited, so if the rep selects too high a status and needs to back-pedal, justification is usually insufficient, and so they safely select low.

Sales management sees the definition of the sales-process as key to providing guidance to the sales organization. What the sales rep actually experiences is like the figure just below. Many important additional steps are required and are left to the rep to define, perform and evaluate.



So while there is a need for a sales-process, the emphasis should shift to the campaign: what actually happens, individually by rep, by account, by location, by product, by season, by industry, by market. All of these factors plus the economy influence the rep's chances and should be considered. The key is to offer to the rep a forum to juggle these variables for a better plan. The selling process is dynamic and normal planning tools will not work.

With more thinking invested in the campaign, good ideas will emerge that shorten sales cycles, expand revenue, and win sales. The net value will be to make the forecast more accurate because the process has become a real-world campaign.

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