Internal Sales People Interview Debrief

7/30/2010
Ceren Sakizli

USEREXPERIENCE

Interview Details

Interview Date
7/19/201

Objective
Understand the difference between different sales roles and their processes:

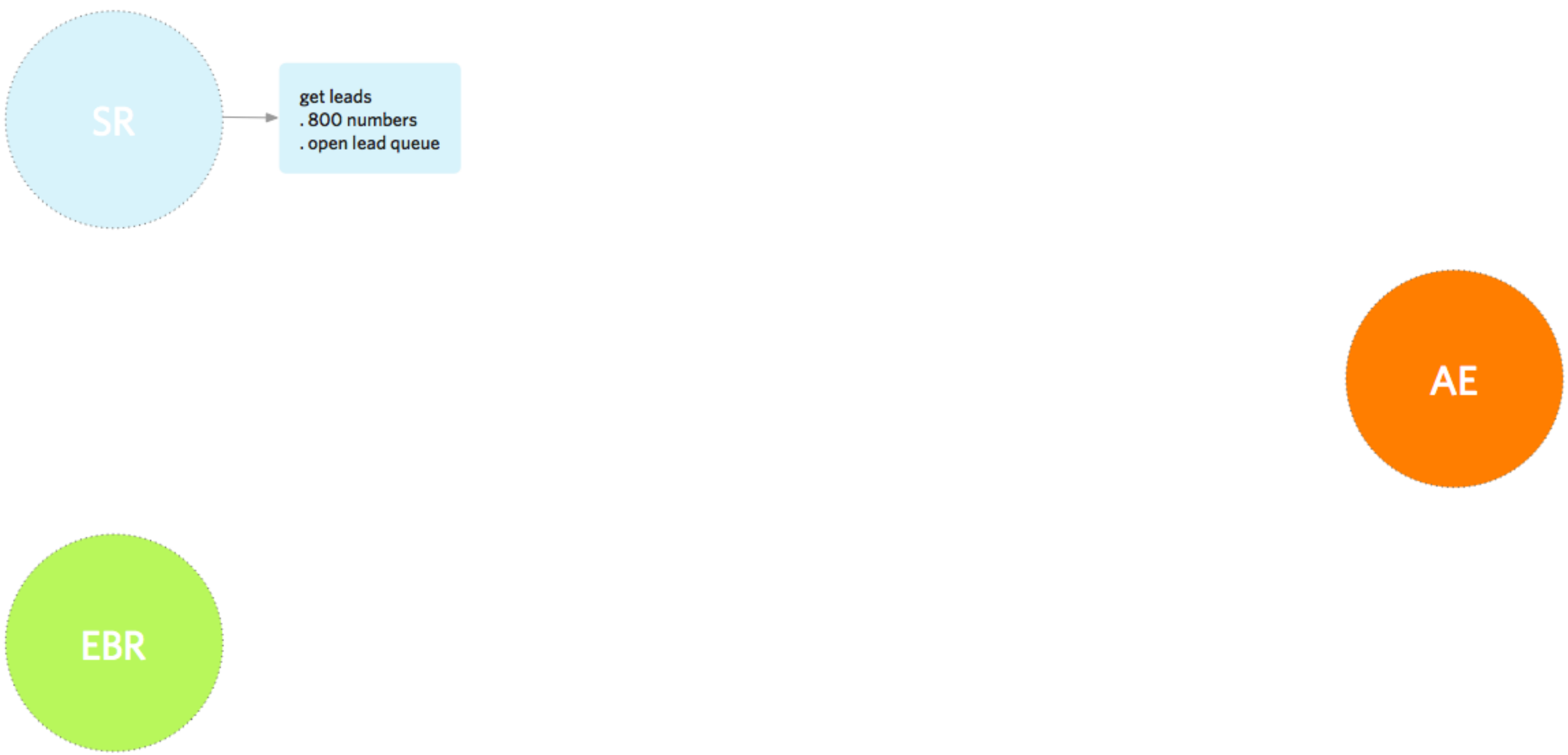
- Sales Representative (SR)
- Account Executive (AE)
- Enterprise Business Representative (EBR)

Understand how each of them do data management and their pain points.

Participants

- 2 SRs
- 1 AE
- 3 EBRs


SR
AE
EBR


SR
get leads
. 800 numbers
. open lead queue
AE
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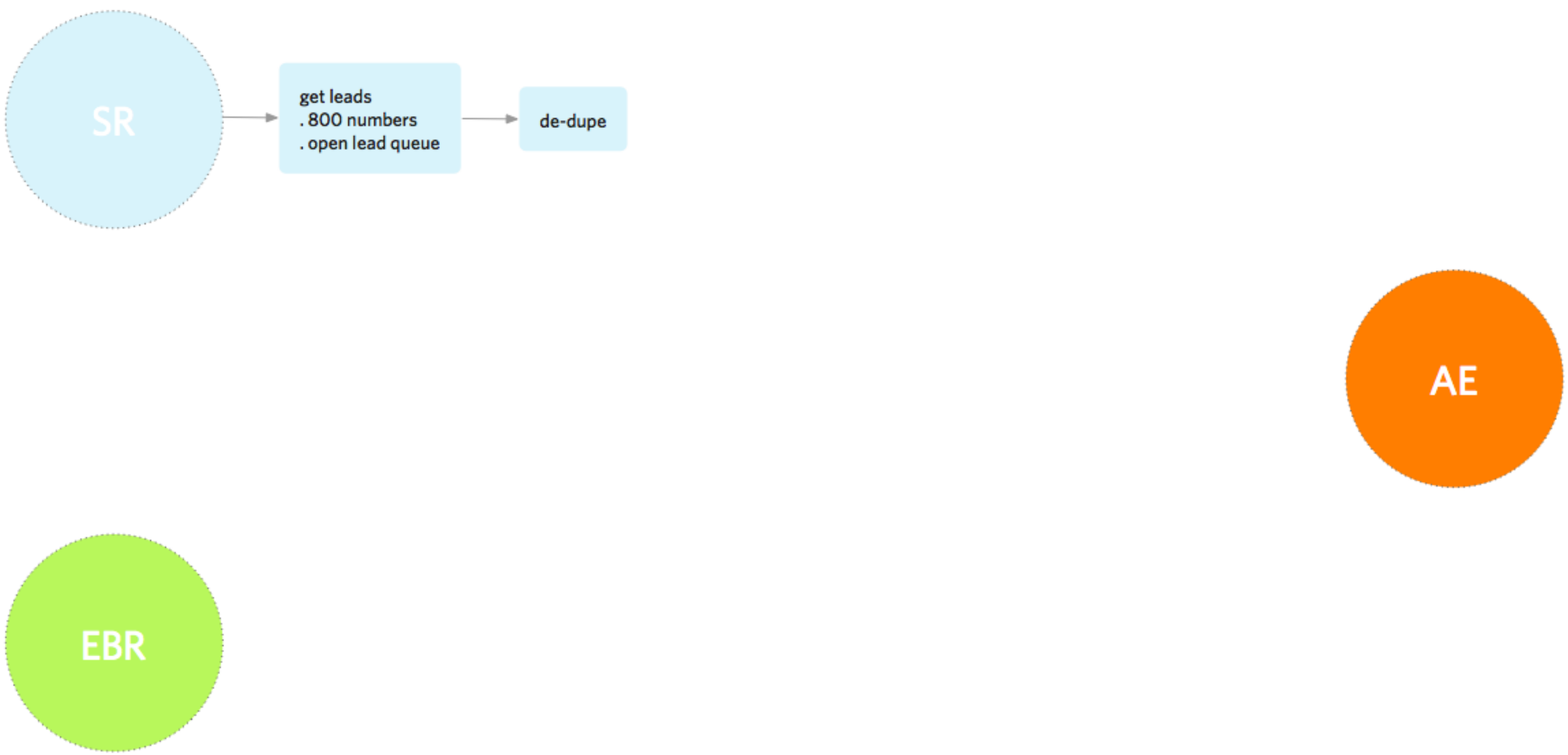
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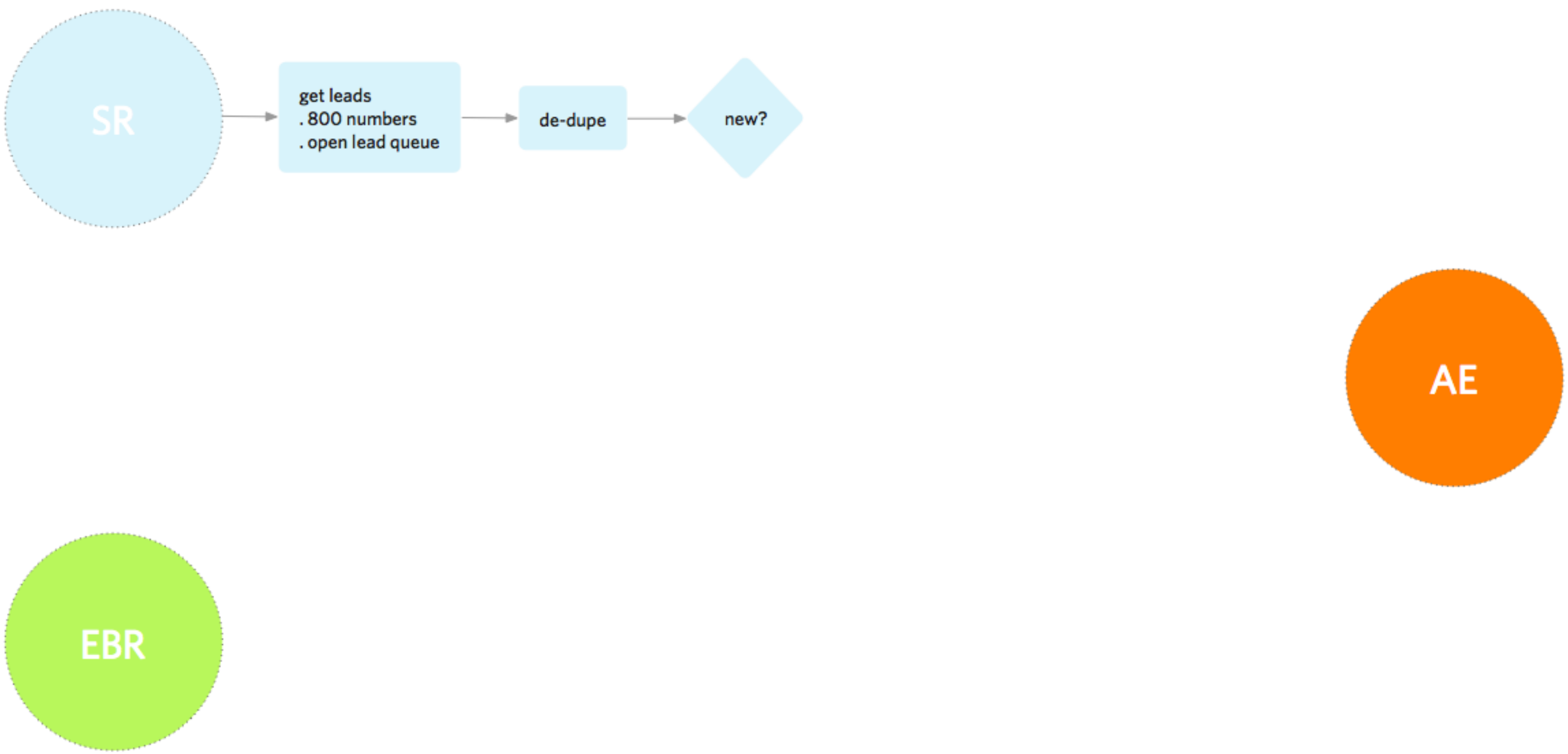
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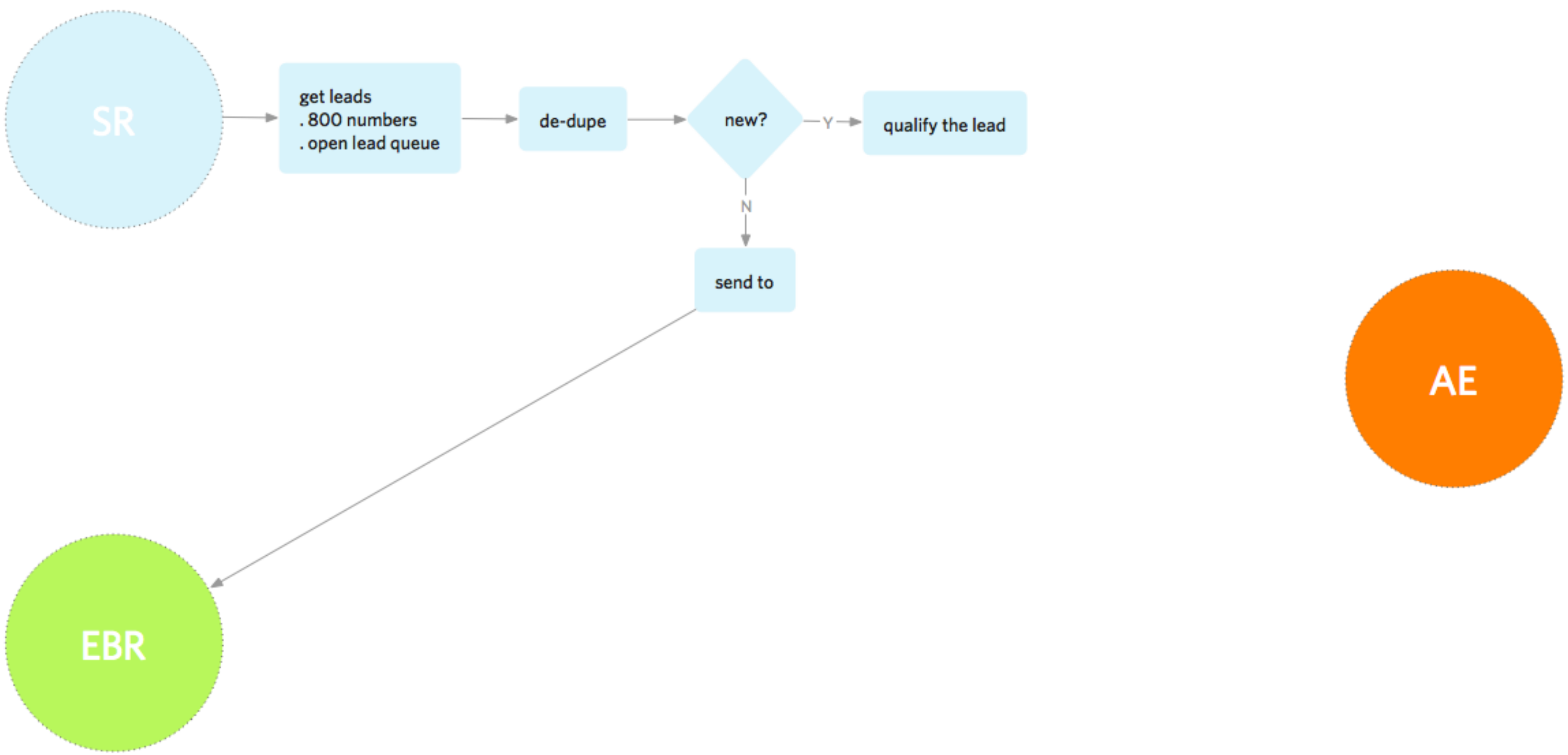
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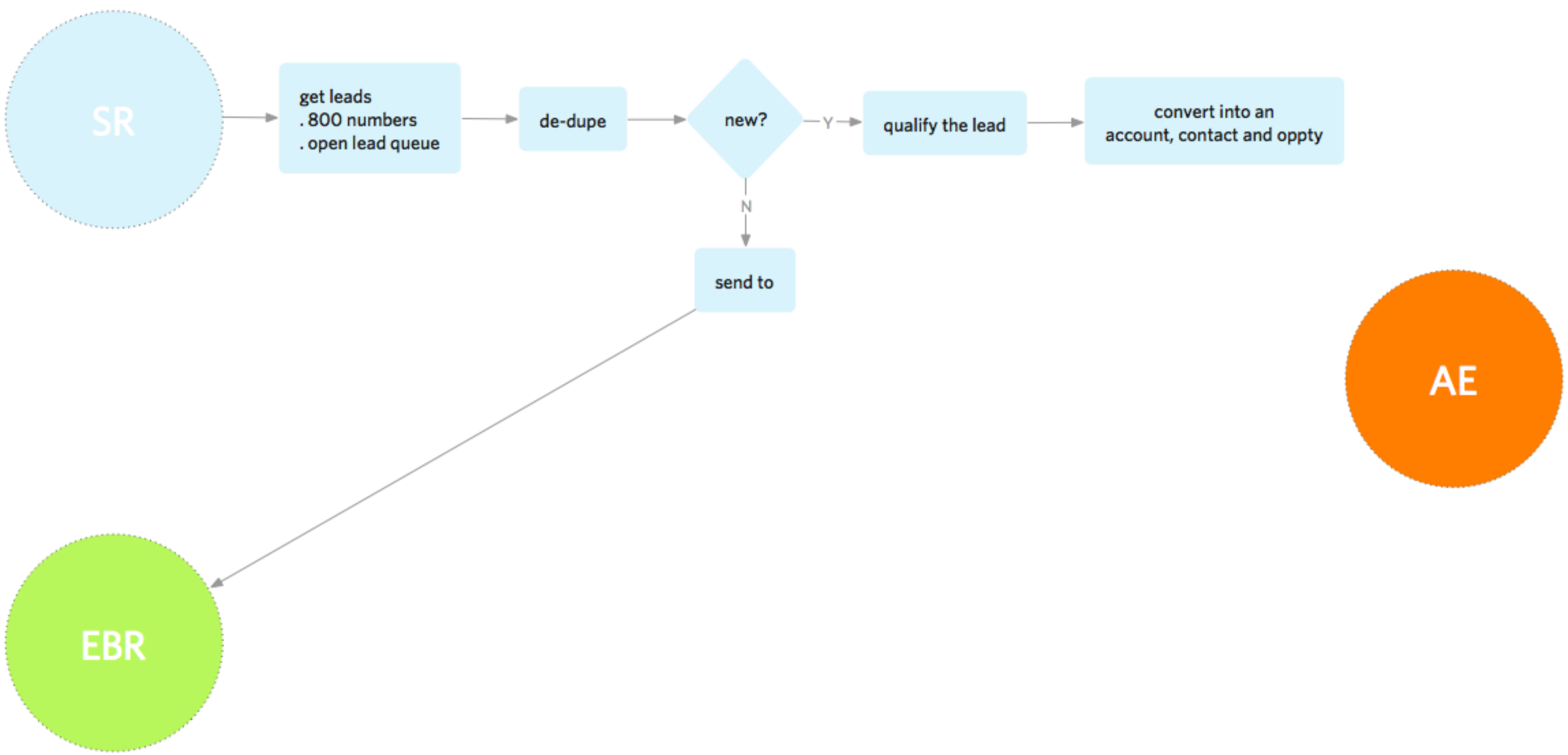
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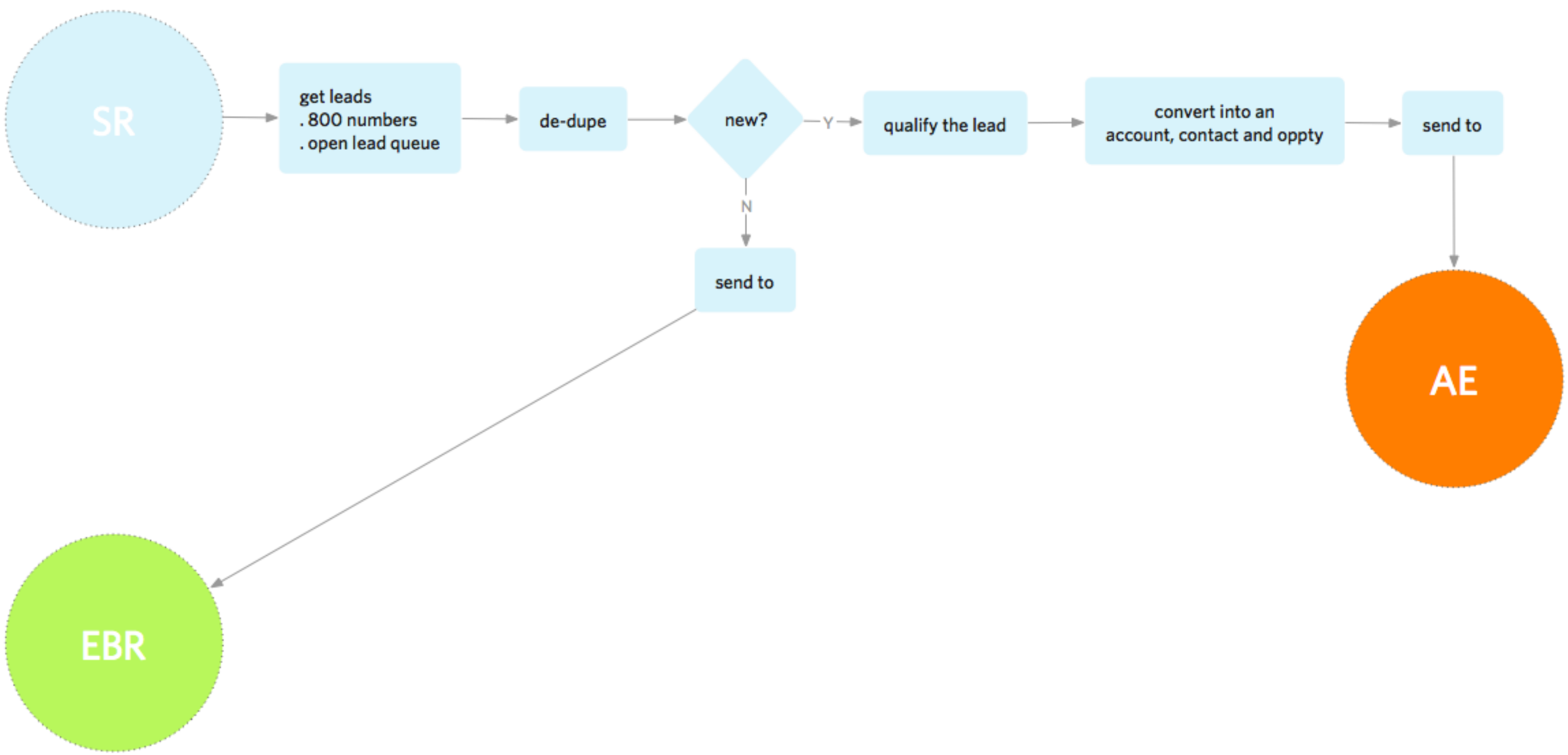
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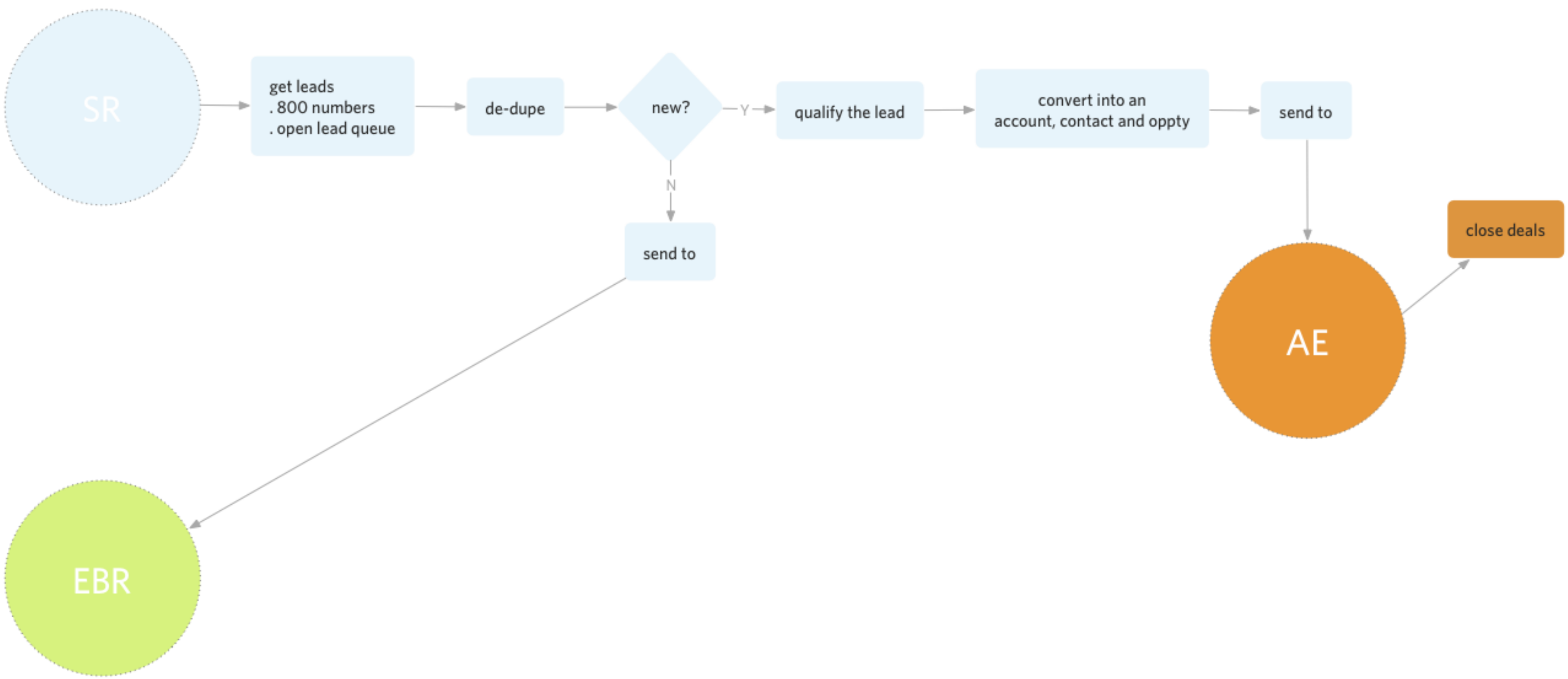
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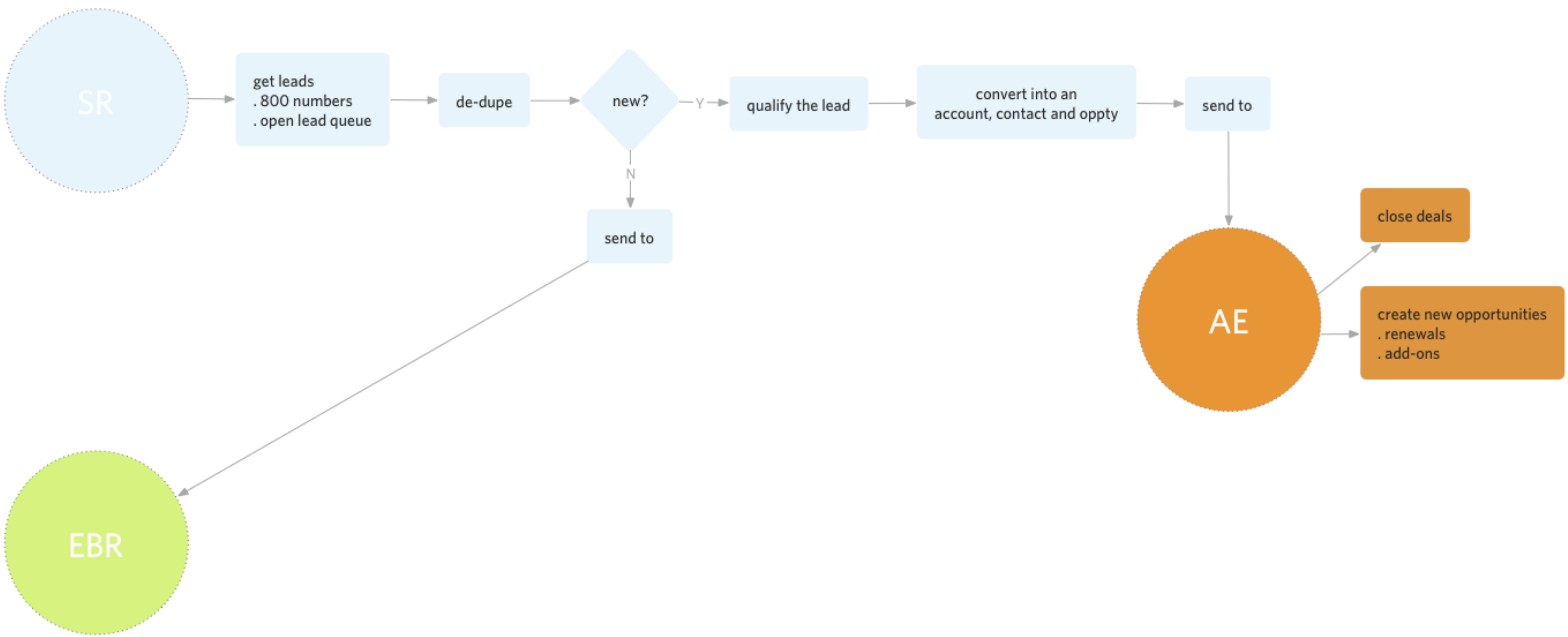
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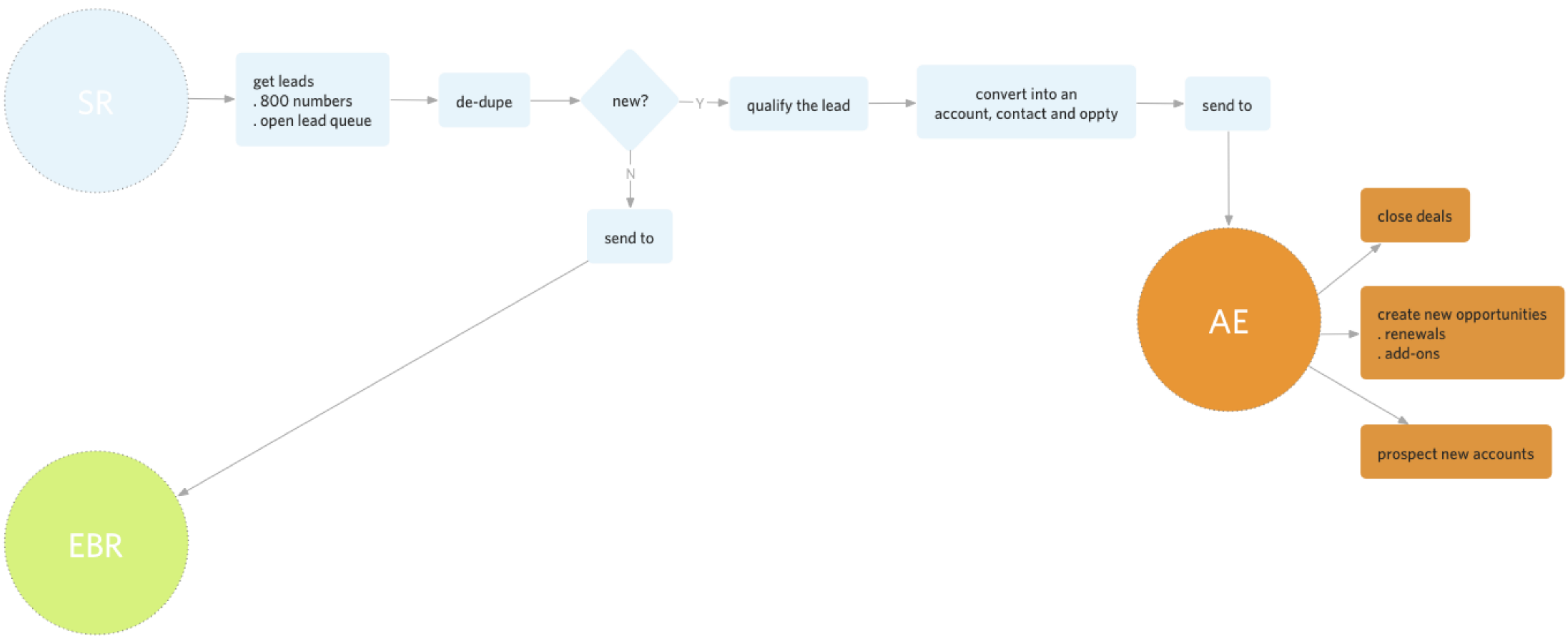
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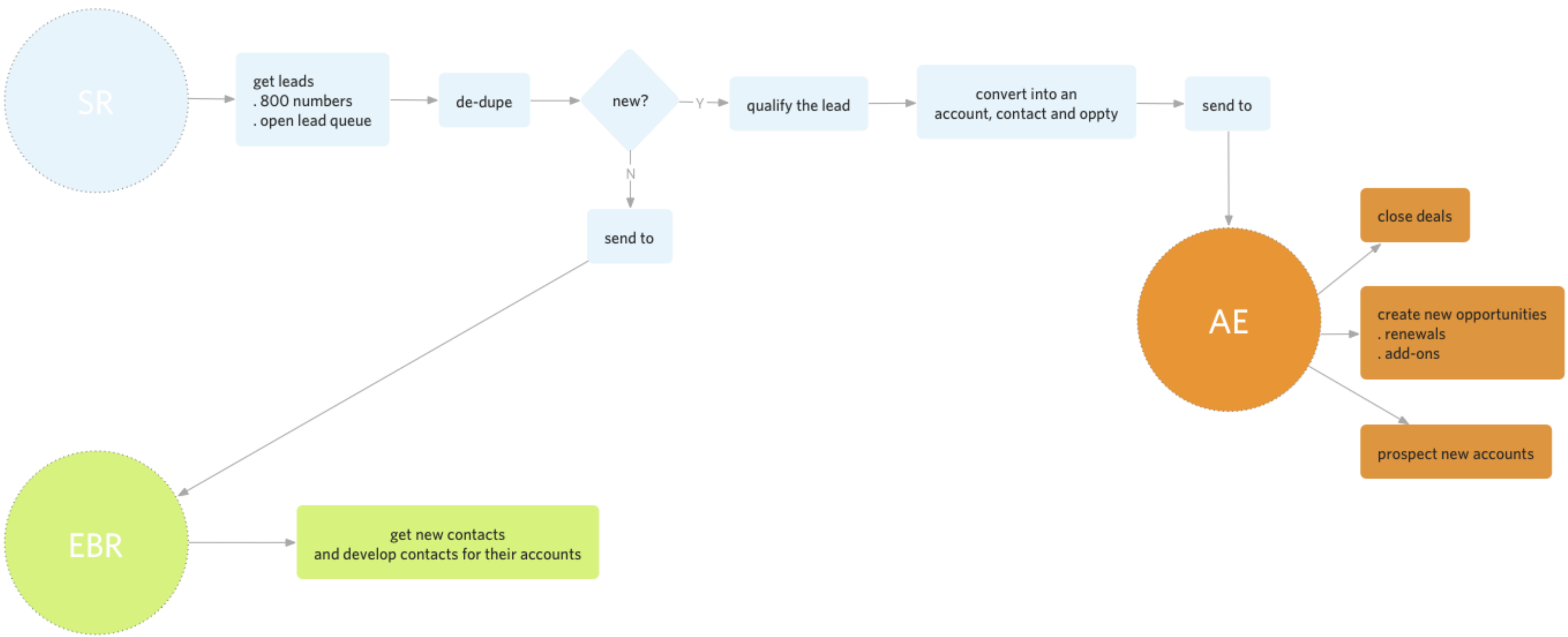
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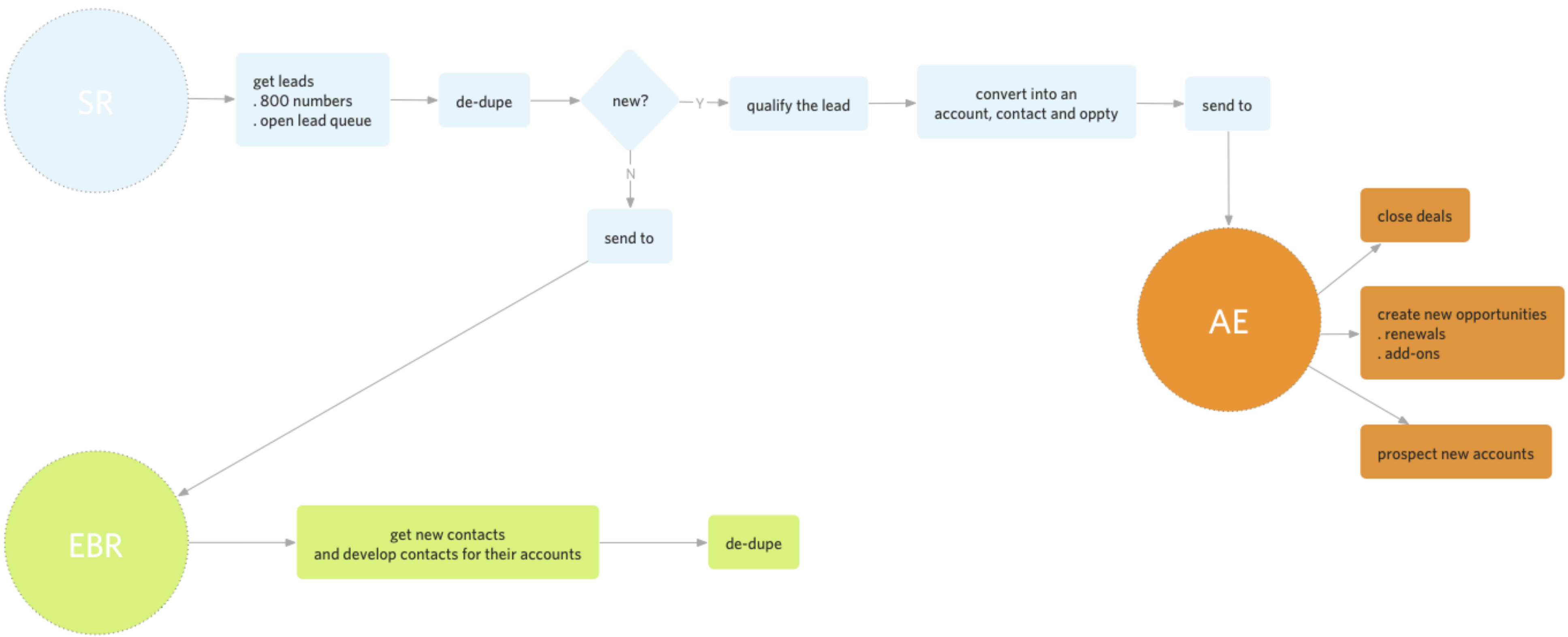
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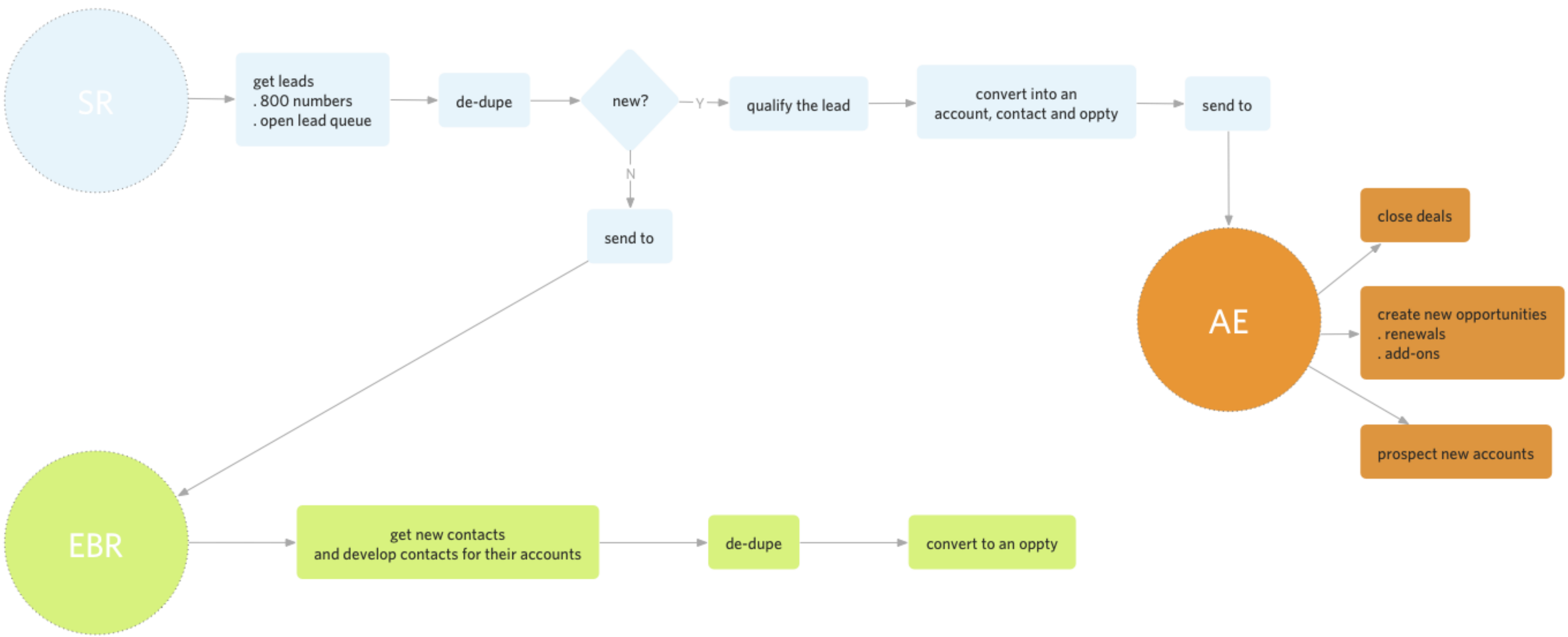
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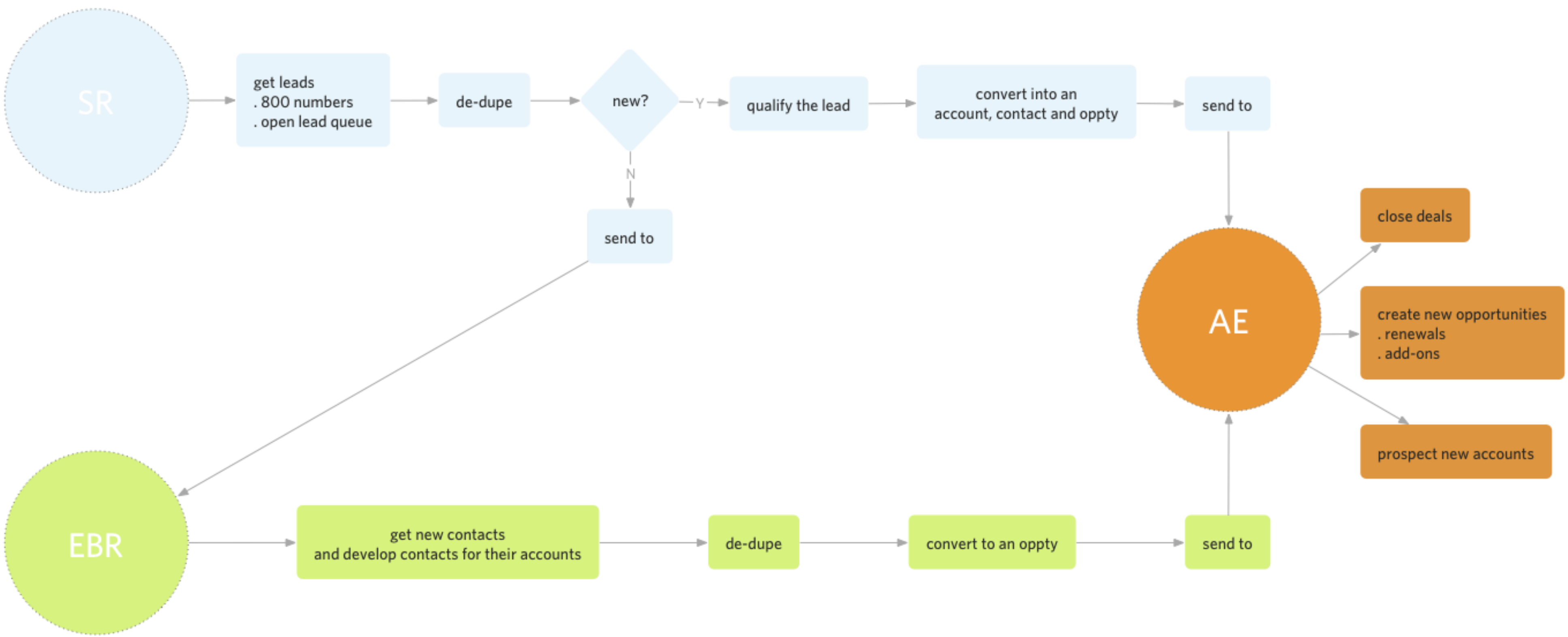
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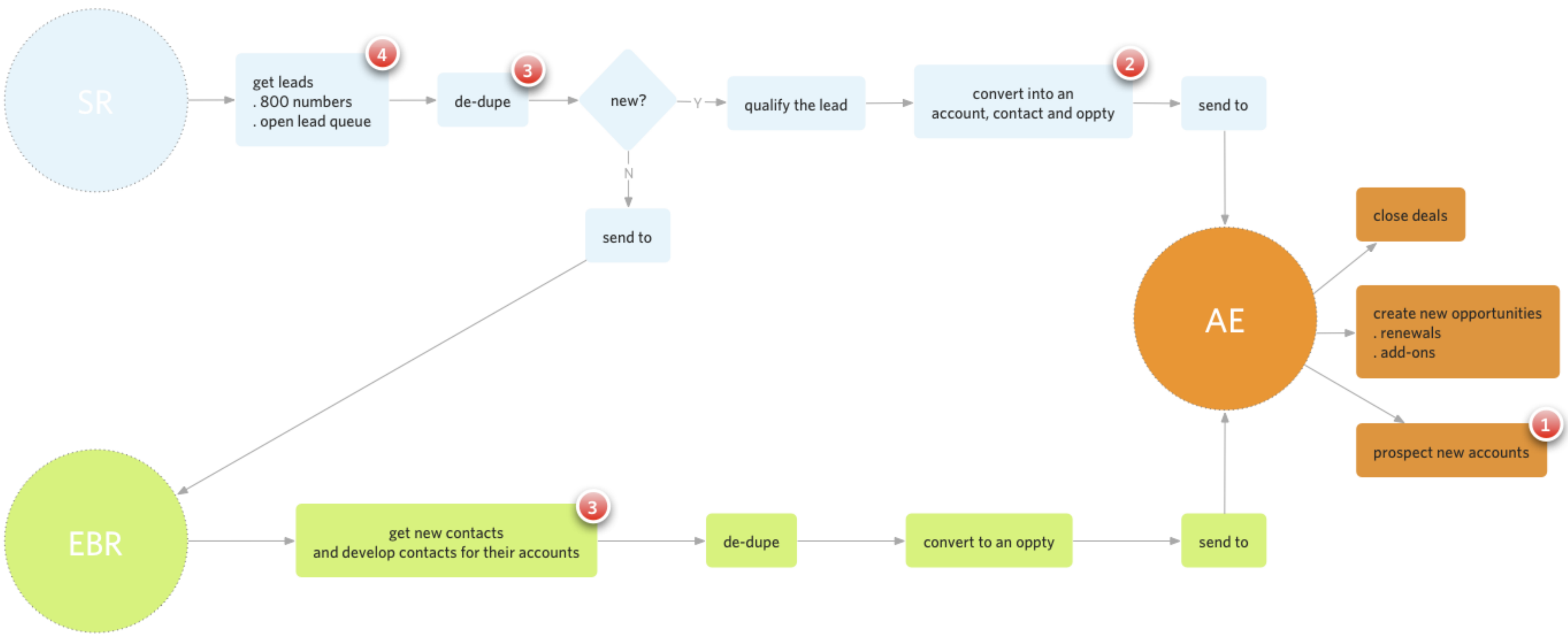
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PAIN POINTS

1. Lose calls because they ask for a lot of personal info upfront.

"Sometimes these things are hard to hear, people get angry when they have to repeat themselves, when they have to spell things."

2. Calls sometimes drop before getting their contact information.

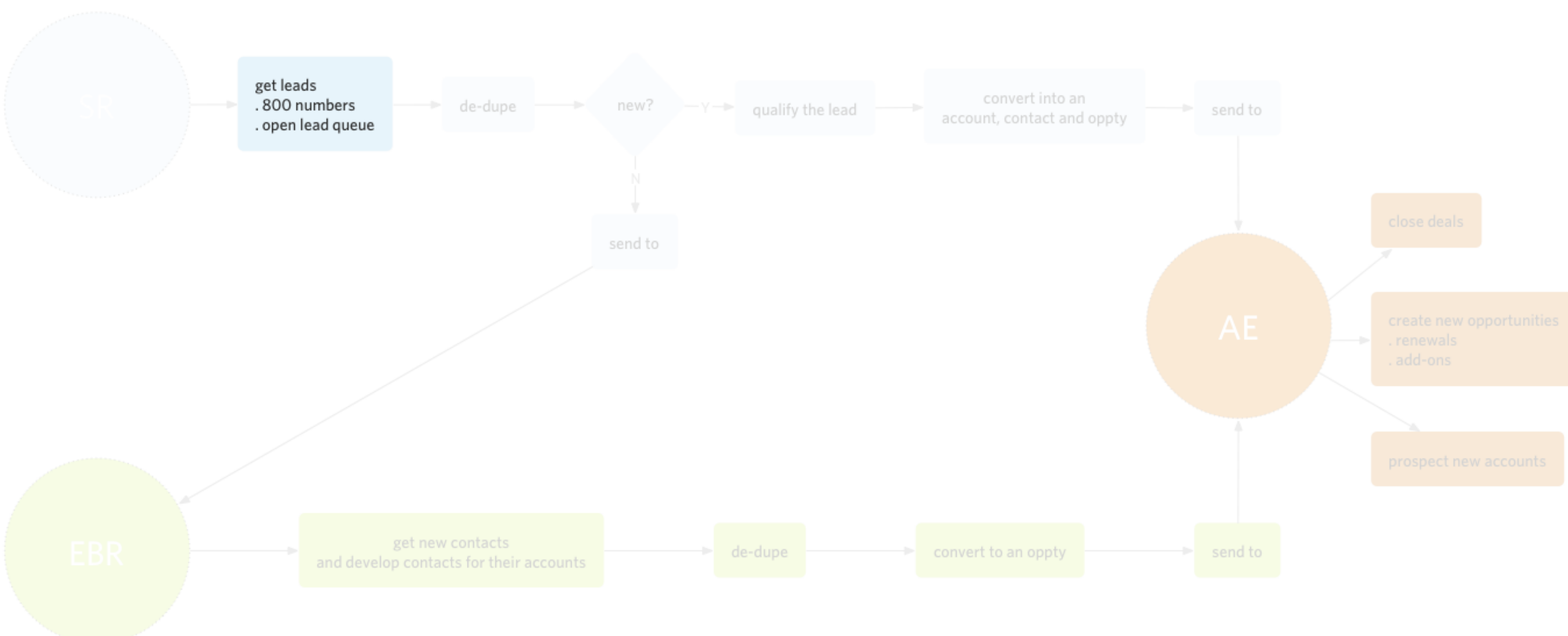
"That was an opportunity, because I didn't get it in the lead, that one mistake, I lost that opportunity"

3. Frustrating if they can't get all the personal info because they won't be credited.

"We're required to get FN, LN, company name, company address, phone #, email, dental records :) we want so much information from them just so they could find about pricing."

4. SRs spend a lot if time going to other websites to find the right info for that lead.

"Sometimes they just tell me, oh I was going to put it down there, but I just wanted to take a look at it first, but I DO want to talk."



IDEAS

1. Lose calls because they ask for a lot of personal info upfront.

Enter the company name > give me the new contacts > match the person on the phone, with the name.

2. Calls sometimes drop before getting their contact information.

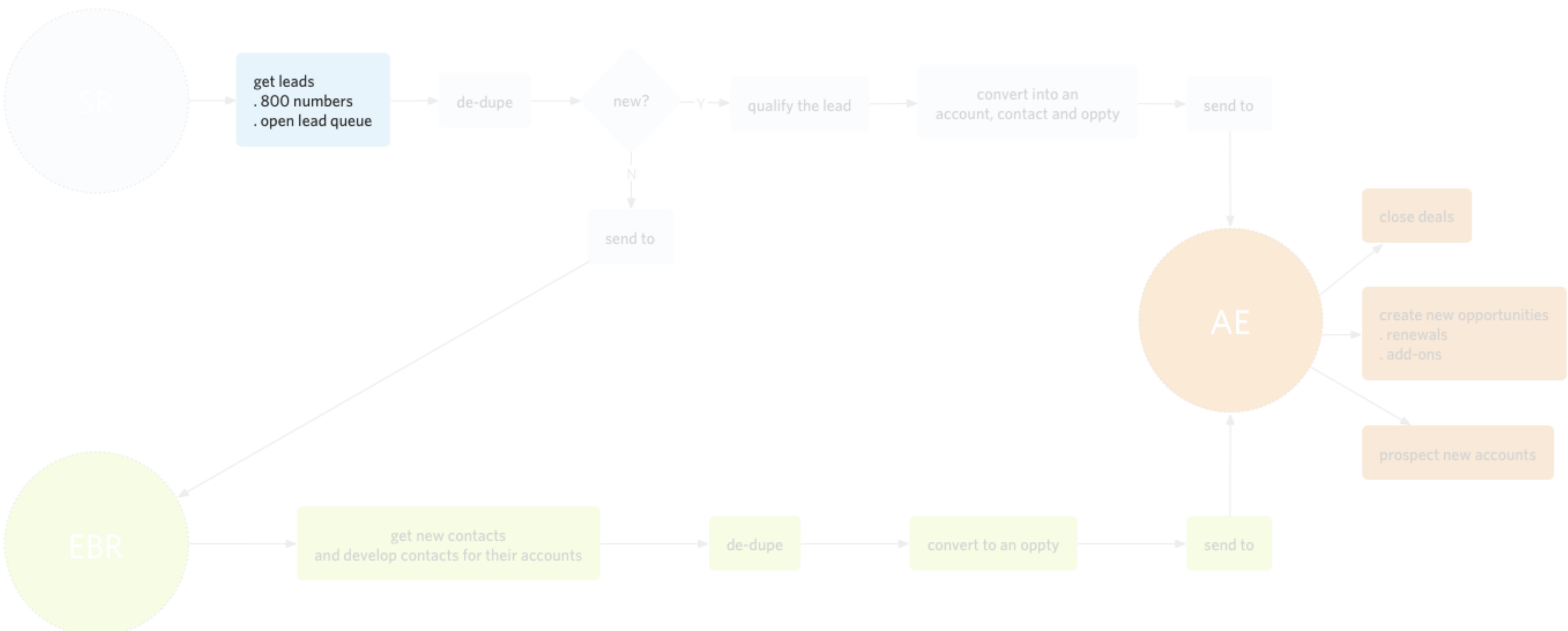
Auto-populate the lead information without asking that person.

3. Frustrating if they can't get all the personal info because they won't be credited.

Same as above.

4. SRs spend a lot if time going to other websites to find the right info for that lead.

On the lead detail page, show which fields are incorrect and show the correct info from jigsaw. Give the option to update.



PAIN POINTS

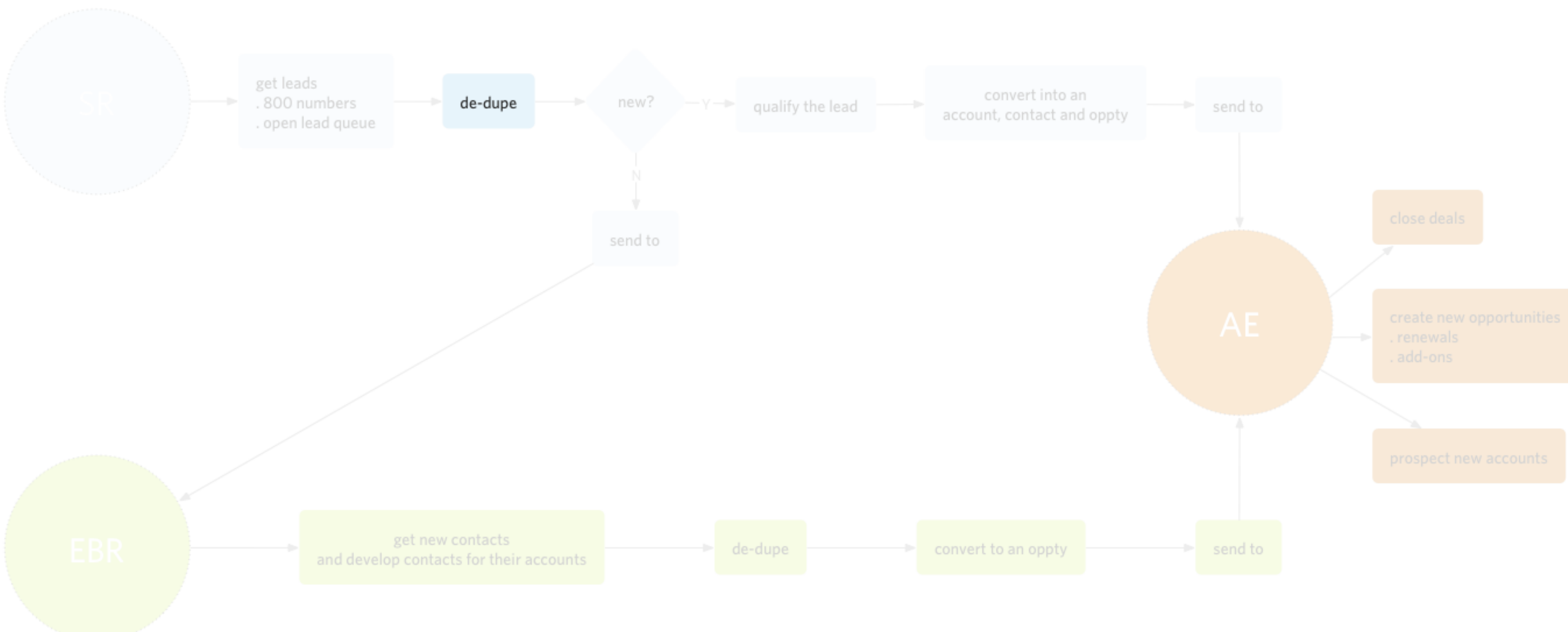
1. Spend 10-15% of their time on de-duping.
They have to do this for every new lead.
If a person came and signed up for a demo, then a trial then a white paper these are 3 separate leads. Especially "so that they don't step on any toes".

2. Need to search for all the combinations for the company name not to miss a potential match.

"Depending on how you write it, you might miss really important data".
"When we do de-dupe we check the company name as many different ways as possible, spaces, no spaces, &, whatever we can do..."

3. Not allowed to create new accounts.

"Sales Ops...They hate us"



IDEAS

1. Spend 10-15% of their time on de-duping.
They have to do this for every new lead.
If a person came and signed up for a demo, then a trial then a white paper these are 3 separate leads. Especially "so that they don't step on any toes".

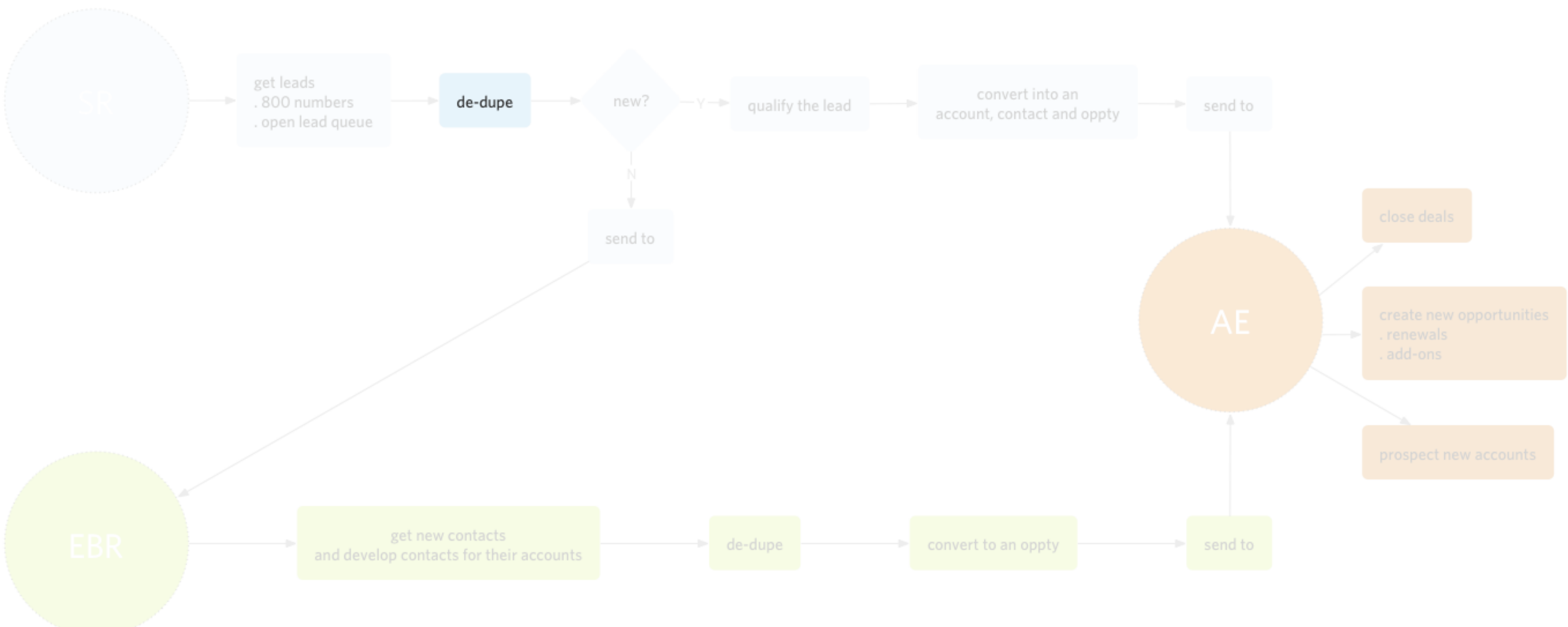
Push the dupes to them, with chatter, or show dupes on the layout, avoid them having to pull.

2. Need to search for all the combinations for the company name not to miss a potential match.

Smart search matchings. Auto-suggest, did you mean?

3. Not allowed to create new accounts.

Prevent duplicate entry, detect and disallow duplicates upon creation.



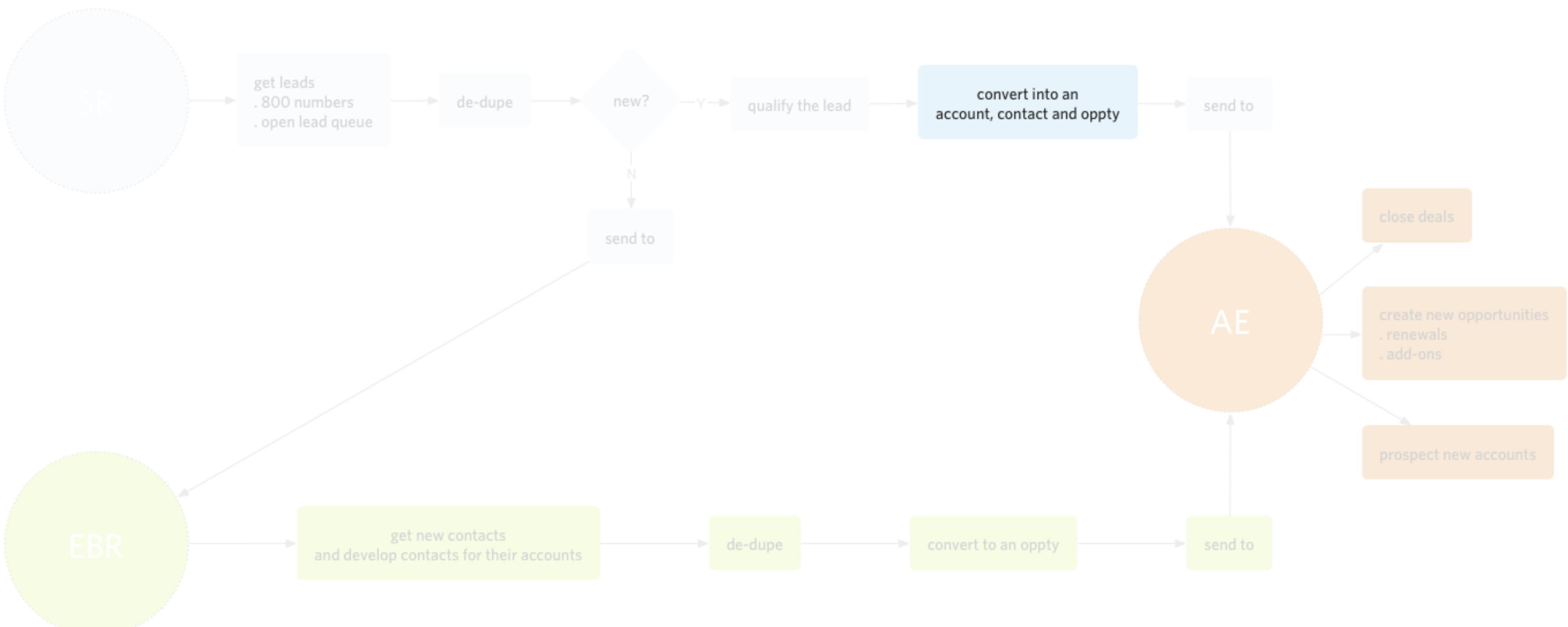
PAIN POINTS

1. Not allowed to create new accounts.

"...ask mom and daddy [Sales Ops] for permission.."
"Sales Ops...They hate us"

2. The opportunity will have only one contact which is not helpful for the AE.

"...I'd say about 50% of the opps I get, maybe 60% only have one contact associated to it. Then I have to figure out where everybody else is."



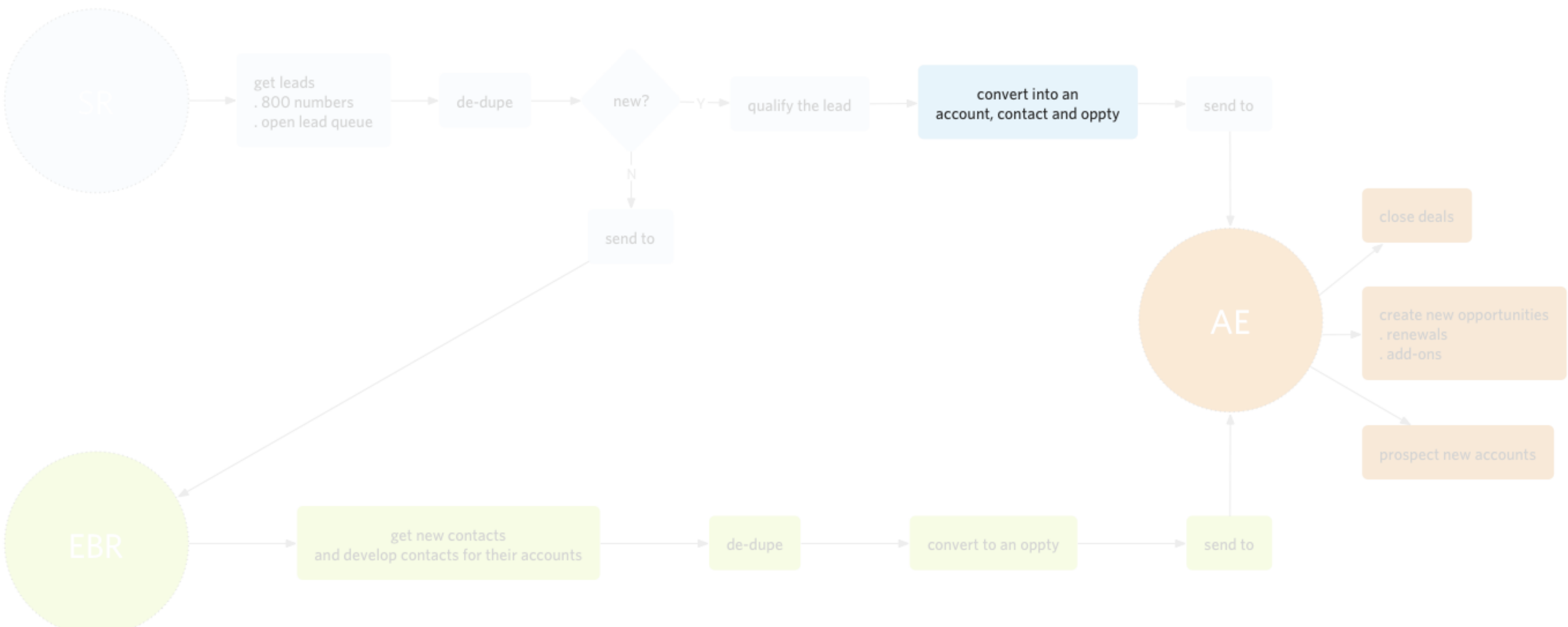
IDEAS

1. Not allowed to create new accounts.

Prevent duplicate entry, detect and disallow duplicates upon creation.

2. The account will have only one contact which is not helpful for the AE.

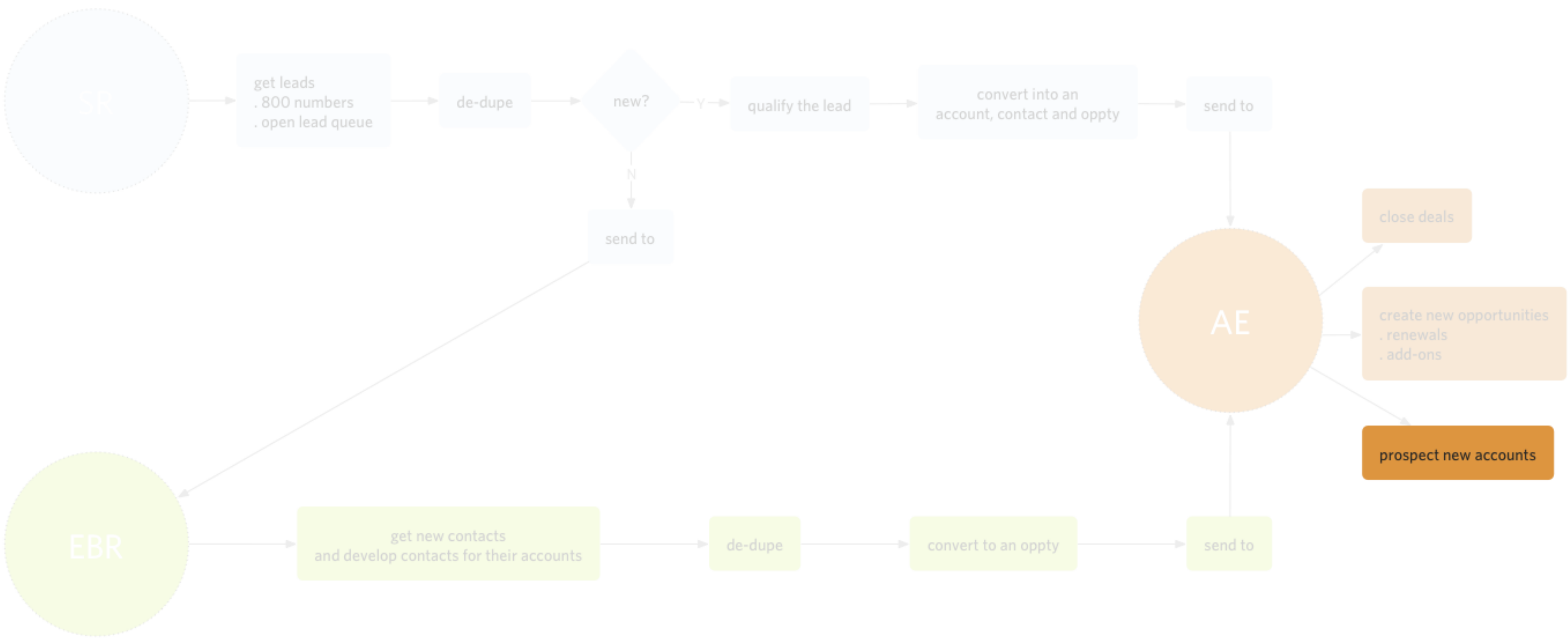
When the account gets created, surface the Jigsaw contacts there where you can directly mass import.
Another one; either integrate import contact to the account creation flow, or add contacts to it implicitly using a set criteria (based on title?).



PAIN POINTS

1. Searching for new accounts and finding new contacts takes a lot of time.

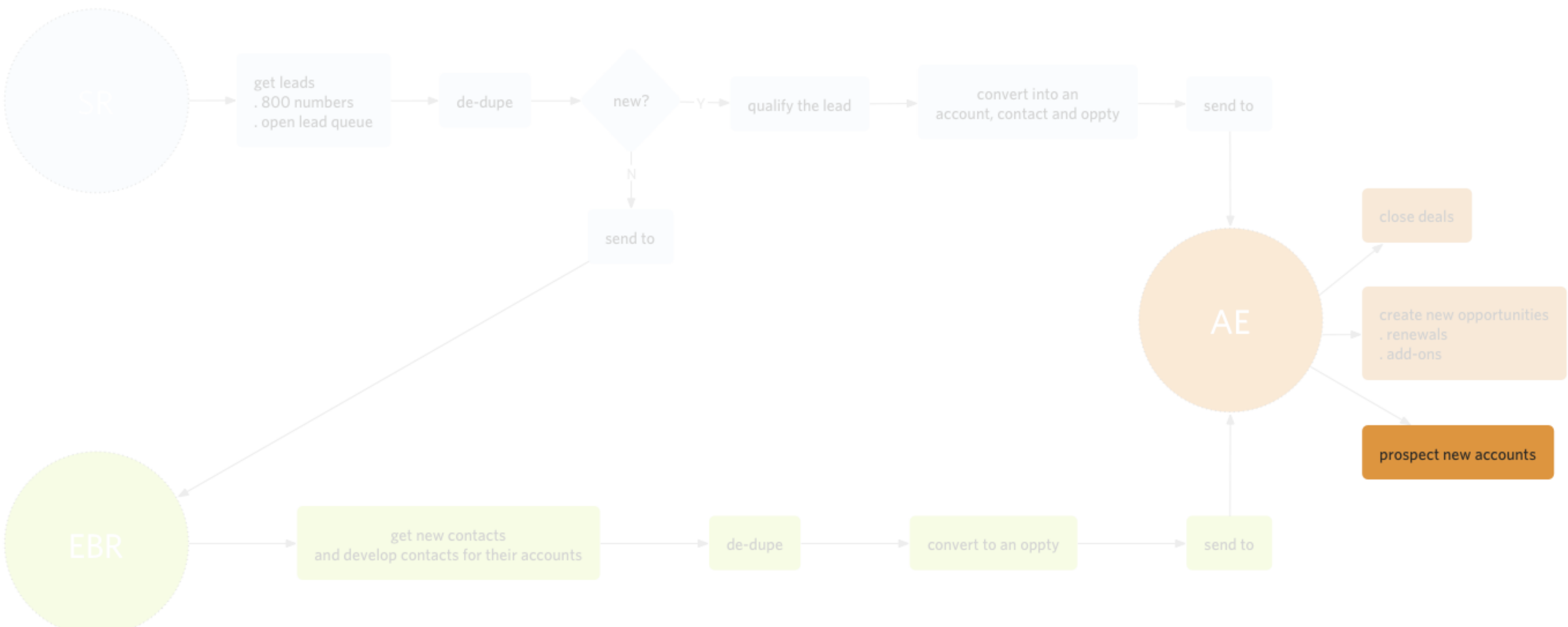
"It's time consuming for us to have to go in, especially creating new accounts, prospect into it, the research of it just takes too much time."
"It's a matter of taking away that 60 minutes of creating it [account], finding the contacts... once we do that, we'd definitely use it."



IDEAS

1. Searching for new accounts and finding new contacts takes a lot of time.

. Let them do the search in the app with criteria. When they import, import contacts right away.
. Let them find similar accounts to their account(s) with one click.

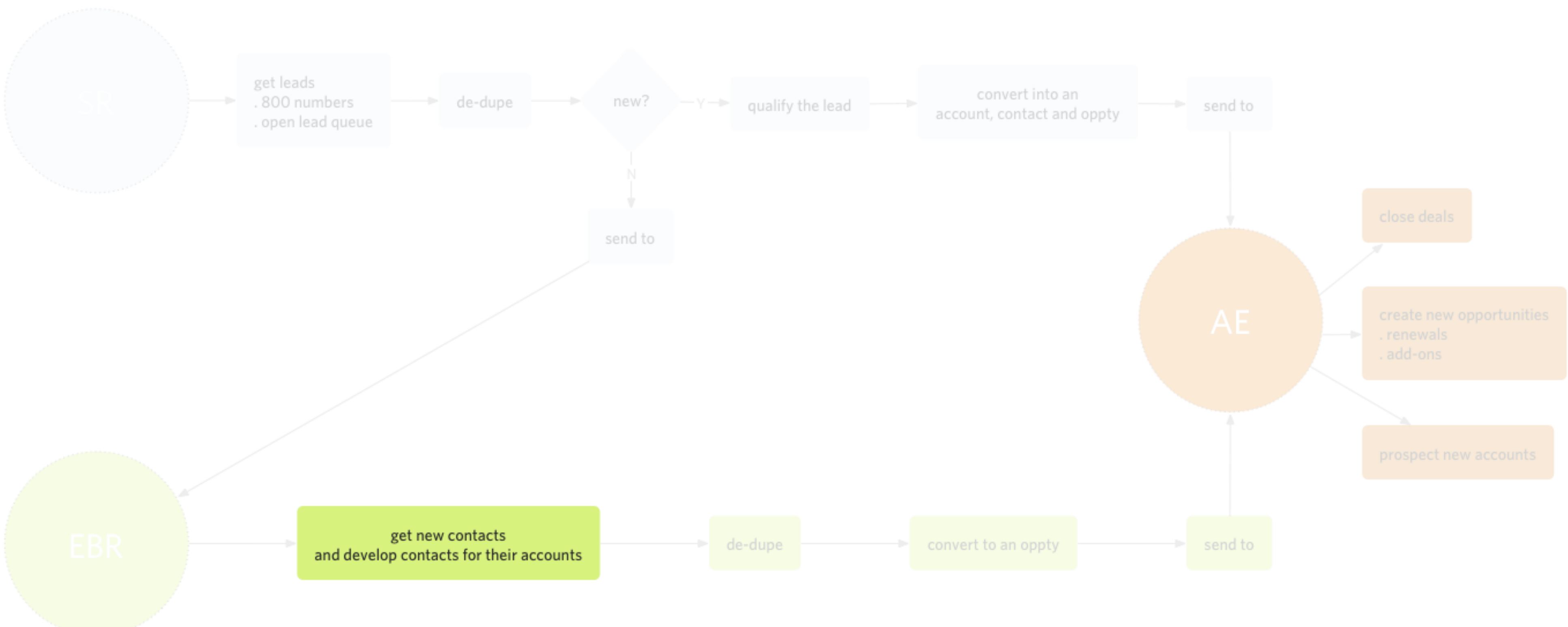


PAIN POINTS

1. When they mass add new contacts, it's mixed with the old contacts, hard to act on them immediately.

2. Constantly need update their contacts' information. They're not always looking for new contacts, people joined the company, left the company or moved around.
"...so you'd know to go to look, cause sometimes like LinkedIn you don't know if there's a new hire or anything has changed, you literally have to go and SEE if something has changed."

3. Need to use a lot different tools, websites to fill in the required information, like D-U-N-S number, SIC code, number of employees...etc. Or to figure out if the company is a subsidiary.
"There's something about going to a different tab that breaks your concentration...going out of it [their work flow], lose my task."



IDEAS

1. When they mass add new contacts, it's mixed with the old contacts, hard to act on them immediately.

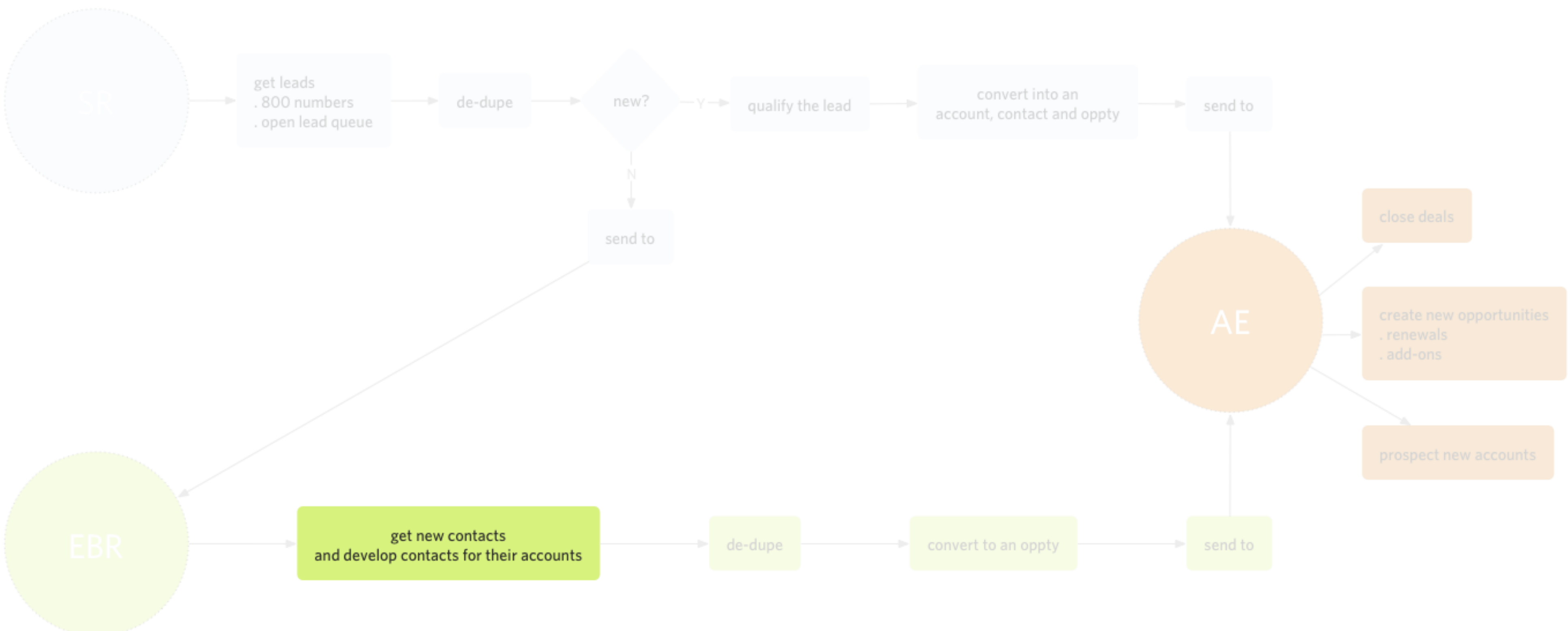
Have a quick way of seeing lastly imported contacts (button on the RL, a view..). From the this list, have an easy way of creating tasks, logging calls (quick create actions on the list).

2. Constantly need update their contacts' information. They're not always looking for new contacts, people joined the company, left the company or moved around.

Use Chatter to push the information to them about new contacts, update existing contacts > new contacts added for this account, John Doe's title and direct number has changed update... etc

3. Need to use a lot different tools, websites to fill in the required information, like D-U-N-S number, SIC code, number of employees...etc. Or to figure out if the company is a subsidiary.

Add most commonly used fields (DUNS, SIC, employee number) to the jigsaw fields and make them accurate.



OTHER IDEAS *sales people were excited about*

1. Work History

Experience

ceo
salesforce.com
Public Company; 501-1000 employees; CRM; Internet industry
March 1999 – Present (11 years 5 months)

Chairman and CEO

Marc has 6 recommendations (2 clients, 4 partners) including:
- 3rd "Kingy" King
- 3rd Arti Chib, *Vice President, Mansa Systems*

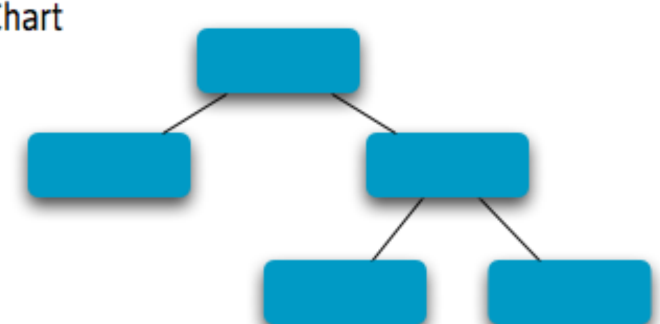
Senior Vice President
Oracle Corporation
Public Company; 10,001 or more employees; ORCL; Computer Software industry
May 1986 – June 1999 (13 years 2 months)

Marc has 1 recommendation (1 report) including:
- 3rd Laurent Pacalin

Intern, Macintosh 68000 Development System
Apple Computer
Public Company; 10,001 or more employees; AAPL; Computer Hardware industry
May 1984 – August 1984 (4 months)

Wrote the example assemby language programs for the Macintosh 68000 Development System during summer of 1984.

2. Org Chart



Thank You!

Questions?