

## How to Hire Sales Reps With CRM “Savvy”

By Marie Warner

As seen in....Harvest Group News

*"If you don't know where you're going, any road will get you there." The Cheshire Cat, Alice in Wonderland*

A critical factor in your CRM success is to hire and develop Sales Reps who will embrace the CRM as one of their most valuable sales tools. Not every sales rep is comfortable with CRMs or with sales process and some will actively short-circuit your CRM, sales reporting and forecasting. How can you spot CRM-friendly sales reps and hire them to help you attain sales success? Here are some interviewing tips that will pinpoint CRM-savvy sales candidates. These questions employ behavioral interviewing techniques. What is behavioral interviewing?

In a sales candidate behavioral interview, the hiring sales manager asks a series of objective fact-based questions to determine whether the candidate has the necessary skills, experience and knowledge to succeed in their company. The basis for this line of questioning is that the candidate's *past performance is the most accurate predictor of future behavior and achievement.*

How can you discover if your sales candidate is a secret agent for the CRM Resistance? Simply ask questions to reveal how the sales person follows and reports sales process in her current (and past) sales job(s) Here are some suggestions for spotting CRM attitudes and experience:

**Question:** *"Take me through the sales cycle for a deal you closed last year."*

**What to listen for:** The sales rep should describe a logical progression of steps, with different contacts and activities - first to qualify the prospect, and then to control selling cycle during evaluation and negotiation. If you don't hear this clear and logical series of steps to closure, drill down to ask the candidate for the critical milestones in that sale, and in a typical sale. Sales Reps with "CRM Savvy" are aware of the sales process and see the sale cycle as a series of steps - some of these steps are milestones critical to advancing to deal closure. **Warning:** Sales Reps lacking process aptitude sell "point-to-point." Consequently each sale seems a new and unpredictable event.

For further insight, describe to the candidate a hypothetical sale "in distress." This example should be based on an actual and common sales challenge at your firm. Ask the candidate to tell you what she would do to turn around that situation. And again, look for a *series of logical steps* - not a single point solution.

**Question:** *"In a perfect world how would you report your daily activity to your past sales managers? Your weekly, monthly, and quarterly Sales Forecast?"*

**What to listen for:** By now, most sales organization have deployed some standard CRM system. Yet many sales reps (and their managers!) continue to rely upon "oral tradition", with key pipeline activity and customer information conveyed in phone calls and weekly meetings.

**Warning:** If a sales candidate prefers verbally communicating her sales activity, her productivity is not documented, and critical updates on sales opportunities may not be captured, or may be captured incompletely in the CRM System.

Another danger of verbal activity and pipeline updates is that the Sales Forecasts are generated independently (often through hope and fear) using spreadsheets with no cross-check as to where the prospect actually falls in the cycle, and milestones successfully passed. All updates and activity must be captured in the CRM System.

**Question:** *What CRM systems have you used? How did you use them? What information do you use from them?*

**What to listen for:** You are looking for a sales person with good habits in using and updating a CRM

system. If she is familiar with the CRM system that your sales team uses, terrific! But what's more important is that the sales person consults, reports and updates the system **virtually contemporaneously** with the sales activity. The sales person with high Sales Process Aptitude will rely upon the CRM tool to *help them sell*.

**Warning:** - Beware of candidates who maintain "their own system" of tracking activity and accounts, either written in their Day-Timer, or in separate customer notes. The sales candidate who uses the CRM only to create reports and forecasts to appease management can derail the success of your CRM and "infect" other reps with poor reporting habits.

Overall, your sales interview questions should be tempered with the possibility that the Sales Rep candidate may be fully willing and eager to use the CRM System to report call activity and to prepare Sales Forecasts, but her Sales Manager continues to rely upon informal, oral updates.

Your CRM System is the *roadmap to meeting your business and revenue goals* - with starting point, best route and ultimate destination defined. Hiring Sales Reps who have internalized sales process and effectively use CRM is a key component in maximizing CRM success. Unlike Alice in Wonderland, taking any path to an unknown place, with CRM savvy and sales process aptitude, your sales team **knows where they are going and the best way to get there**.

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## About the Author

Marie Warner is founder and President of Warner Professional Sales, LLC. Warner Professional Sales helps companies achieve **sales force success through people, performance and planning**. Warner Professional Sales helps companies get more revenue growth from their sales force by *recruiting* the right sales staff, 2) *training and developing* those sales professionals to consistently exceed revenue goals, and helping management to define and implement the best sales "process" and tactics for sales cycle control, territory assignments and quota planning.

Marie brings to client engagements over two-decades of leadership in the sale of technology, consulting and financial products and services to the Fortune 1000 and major financial institutions. This includes nine years of experience as Chief Sales Officer, in both enterprise-level and start-up organizations.

Marie Warner has authored articles in **Mass High Tech, SalesResources.com, SalesVantage.com, EyesOnSales.com, Software Sales Journal, SalesDoctors**, and **Women's Business** addressing successful sales strategies and tactics. She is a member of NETSEA (New England Technology Sales Executives Association), WITI (Women in Technology, International), Human Capital Institute, The Commonwealth Group, NAPS (National Association of Personnel Services) and participates in numerous other entrepreneurial, technology and marketing organizations.

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