

PAS 8401:2014

Implementing an inside sales management methodology – Guide



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Contents

Foreword	iii
0 Introduction	iv
1 Scope	1
2 Abbreviations, terms and definitions	1
2.1 Abbreviations	1
2.2 Terms and definitions	1
3 Process map	3
4 Regulation	5
5 Pre-implementation planning for inside sales (PLAN)	5
5.1 Concept development	5
5.2 Objectives of using inside sales	5
5.3 Designing the inside sales function	6
5.4 Design of performance indicators	7
6 ISM operations (DO)	11
6.1 Inside sales function – detailed design	11
6.2 Detailed process design	11
6.3 Conversion of ISAs into individual daily tasks	11
6.4 Inside sales operations	14
7 Checking and analysing (CHECK)	19
7.1 General	19
7.2 Analysing activity	19
7.3 Performance analysis	19
8 Adjustment – Proposing improvement measurements (ACT)	21
9 Information system and data views	23
9.1 General	23
9.2 Operational support system (ISM system)	23
10 Human resource management in ISM	25
10.1 General	25
10.2 Deployment of ISRs	25
10.3 Training	27
10.4 Steps for developing capabilities and forming careers	27
10.5 Managing motivation	28

Annexes

Annex A (informative) Market segmentation 29
 Annex B (informative) Activity design example 30
 Annex C (informative) Peripheral equipment and software 31
 Annex D (informative) Training programme menu (Example) 32

Bibliography 33

List of figures

Figure 1 – Substitution of inside sales activities staff with other sales staff 9

List of tables

Table 1 – Process map 3
 Table 2 – Management cycle of ISM (guide to contents of this PAS) 4
 Table 3 – Breaking down processes 7
 Table 4 – Possible stage definitions 8
 Table 5 – Examples of the structure of activity indicators 13
 Table 6 – Determining the levels to be set in activity indicators 13
 Table 7 – Setting performance indicators 14
 Table 8 – Example of content to prepare before approaches, by call objective 15
 Table 9 – Activity management definitions 16
 Table 10 – Examples of reporting required 17
 Table 11 – Performance indicators and considerations 20
 Table 12 – Examples of activity management adjustment 21
 Table 13 – Performance indicators and adjustments 22
 Table A.1 – Prioritization data 29
 Table B.1 – Example activity types required in inside sales processes 30
 Table D.1 – Basic communication skills training programme (example) 32
 Table D.2 – ISR skills training programme (example) 32

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Foreword

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Use of this document

As a guide, this PAS takes the form of guidance and recommendation. It should not be quoted as if it were a specification or a code of practice and claims of compliance cannot be made to it.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its requirements are expressed in sentences in which the principal auxiliary verb is “should”.

Commentary, explanation and general informative material is presented in italic type, and does not constitute a normative element. The word “may” is used to express permissibility and the word “can” is used to express possibility, e.g. a consequence of an action or an event.

Spelling conforms to The Shorter Oxford English Dictionary. If a word has more than one spelling, the first spelling in the dictionary is used.

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0 Introduction

The costs of the sales function are constantly under scrutiny. Many organizations now conduct sales activities which might previously have taken place at a customer's premises, over the telephone. Besides the cost advantage, with customers having less time for discussion with suppliers, inside sales can offer more convenience to customers.

This PAS is a guide intended for use by leaders of the business development function within organizations that have or are planning, inside sales, or telesales as they are otherwise known.

When considering the deployment of telesales, most organizations examine whether to deploy their own staff (insourcing), or to outsource. This is a major decision which is based on a range of multiple criteria such as relative costs, access to skills, flexibility of options, reputational risk, availability of internal staff or external suppliers, and the organization's ability to manage inside sales operations. The decision whether to insource or to outsource needs to be also examined from a range of managerial perspectives. Another consideration is the degree to which the sales process can be managed online. For example, for frequent re-orders, customers may prefer to have access to a customised portal.

The context of this guide is inside sales, which includes telesales managed in-house. Its guidance might also be relevant to organizations who manage external sales activities on behalf of clients. This PAS provides a methodology for corporate sales organizations to efficiently plan, execute and control inside sales activities (ISAs), as part of a wider inside sales management (ISM) strategy to help achieve sales revenue and growth objectives.

It is important that individuals within organizations, who are responsible for achieving or supporting sales-related business objectives, understand methods for implementing ISAs, including:

- introducing ISAs effectively at the appropriate stage of the sales process;
- planning ISAs appropriate for achieving sales targets;
- building a sustainable system to understand, analyse and implement improvements to ISAs;
- training relevant employees to effectively implement ISAs, within an ISM environment.

Sales processes in each organization vary depending on industry sector, size of organization, attributes of customers, characteristics of products and services, and the depth of relationships with customers. In order to efficiently achieve sales targets, it is extremely important to have a clear view of these sales processes, and to position optimal business resources to execute them. Activities within sales processes vary based on the status of relationships with customers and the stage of business negotiation with them.

It is likely that each organization has a different configuration of activities within the sales process which do not require physical customer meetings and may therefore constitute ISAs. Using inside sales to effectively build relationships, understand customer issues and implement follow-ups can be a more efficient way to manage relationships with multiple customers. Accordingly, ISM offers potential to reduce cost. ISM also incorporates the building and maintenance of good business relationships with customers. However, the primary goal considered in this document is the role of ISM in achieving sales revenue and growth objectives.

The fit of ISM within the organization's business strategies and competitive environment needs to be carefully considered and it is important that ISM is carefully positioned within the overall sales process. The procedures and the elements for considering these are described in detail in Clause 5.

Within ISM, it is essential that ISAs:

- are properly positioned;
- have defined functionality;
- are flexible;
- are designed to achieve the organization's business objectives;
- are designed to deliver benefits (such as convenience) for customers.

A systematic approach based on the PDCA (Plan-Do-Check-Act) cycle is helpful when implementing ISM and analysing the results of ISAs. PDCA, also known as the Deming cycle, is a simple project management model designed to ensure the efficient operation of functions. For the purpose of this document, *check* encompasses analysis, and *act* describes the adjustment of plans.

The core purpose of this PAS is to discuss methods for establishing ISM as a practical capability. Tracking the progress of sales activities, their results and issues, etc., is important to the overall success of ISM. An information system is needed for ISAs that differs from those used to monitor traditional sales meetings, but that also links into the overall sales process. Information systems and infrastructure features beneficial for establishing ISM are discussed in all parts of the document.

This document is organized in the following way:

- Clause 3 Process map (for sales overall).
- Clause 5 (Plan) explains the planning necessary prior to implementing an inside sales function. It covers:
 - concept development (includes objectives, scope and positioning);
 - System design (processes; people and skills; information systems); and
 - Design of performance indicators.
- Clause 6 (Do) provides detailed guidance about ISM operations, including:
 - operational planning;
 - activities and tasks;
 - operational support (e.g. scenarios);
 - operational management analysis; and
 - implementing improvements.
- Clause 7 addresses checking and analysing (Check) of the cycle.
- Clause 8 proposes improvement measures (Act +).
- Clause 9 discusses information systems and data views.
- Clause 10 provides guidance about training and developing inside sales staff.
- The annexes provide peripheral information, supporting the implementation of ISM.

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1 Scope

This PAS provides guidance on the design and implementation of inside sales management (ISM) including all relevant inside sales activities (ISAs), as part of an overall sales strategy.

This includes selling through the use of all methods for communication at a distance, including:

- telephone (inbound and outbound);
- internet chat (inbound and outbound);
- video conferencing;
- web-based software.

It is applicable to all sizes of organization operating in business-to-business sectors in all industries. It is intended for use by senior managers, especially those responsible for sales strategy.

This PAS does not address management of field sales activities (i.e. face-to-face meetings with customers).

2 Abbreviations, terms and definitions

For the purposes of this PAS, the following abbreviations, terms and definitions apply.

2.1 Abbreviations

ISA	inside sales activity(ies)
ISM	inside sales management
ISR	inside sales representative
PDCA	plan, do, check, act (cycle)
ROC	reason of call

2.2 Terms and definitions

2.2.1 account management

maintaining positive relationships with existing customers, leading to the generation of repeat business and extending share of wallet

NOTE Usually, account management involves face-to-face meetings with customers and an account manager is therefore usually a face-to-face sales role. However, inside sales organisations can undertake some account management tasks, such as reminders about regular orders, providing information about product upgrades, etc., or be wholly responsible for managing relationships with customers who are small businesses or who do not order very often. Some inside sales organisations have two functions, one focused on the conversion of prospects to customers and another focused on desk-based account management activities.

2.2.2 action plan

individual plan for ISR to achieve specific business objectives

NOTE might also be referred to as execution plan, implementation plan or call plan.