

## Actually, collaboration is good

A new sales culture and another IT project rescued



A significant reorganisation of the business had prompted the client to integrate two sales forces until then running fairly independently. They had some overlap in their client base. The new integration meant that the need for sharing customer information was now more crucial than before. One year before, the company had implemented a relatively simple version of a Customer Relationship Management system (CRM) which had been very expensive. The software was meant to facilitate the sharing of information in both ways: sales representatives to the centre and the centre to them. After a year of implementation in the then two independent sales forces, the usage of the CRM had only reached 40%. Sales people in both sales forces found lots of excuses (mainly technical) not to use the system. As a result, a lot of customer information was 'stored' in their individual PCs, paper notes or ... their heads. Management was convinced that if the CRM were to be used properly, the rest of the problems would sort themselves out. They were convinced that the integration of sales forces would be achieved if there was a way to make everybody use the system in a more effective way. After all, it had been sold as a 'collaborative software'.

At the earliest stages of the consultant engagement, we were able to convince management that the key issue was behaviours, not process, systems or technology. Both, integration and use of technology were linked by collaboration as a behaviour. Integration needed, amongst other things, new flow of information shared. The use of the CRM needed the concrete action of the sales person inputting into the system because everybody was now highly interdependent in their work, and the CRM would only be as good as people could collaborate by inputting their own 'personal' and 'highly protected' data and sharing with others. But collaboration was not part of the DNA of the sales structure. We didn't need to apply our behavioural audit techniques to recognise that the old way of doing things before was largely individualistic. Sharing information was unconsciously or consciously limited by the individualistic ethos. After all, sales people were rewarded by their individual sales, not by the amount of market information shared with others!

Whilst a traditional approach would have been focused on re-training everybody in the CRM - as strongly advocated by IT and HR - we were able to establish behaviours as a priority over a couple of workshops with senior people and

stakeholders. Using the simple model of 'imagine if' collaboration suddenly became 'normal' in this organisation; how would that affect everything else? 'Collaboration' as a behaviour was then articulated and split into four specific behaviours, of unequivocal meaning for any single sales person, which became 'non negotiable'. In order to spread these behaviours, a small group of champions, about 10% of the sales force, were chosen for their natural influence of others and the overall respect they commanded. They were briefly trained to create informal conversations with their peers about the benefits of collaboration and the understanding of the four behaviours. They were not only able to personally endorse the behavioural change needed but committed themselves to being very visible to others in their own practice of the behaviours. Many times they engaged small groups of four or five peers in such discussions and follow up meetings where everybody shared how much they have personally contributed to the 'new way' and could see the benefits of having a CRM system much more operational. They invariably noticed that just by having those 'conversations' people were able to discover how 'close' they were to other peers in terms of challenges and daily professional experiences.

Each of the champions were asked to generate one or two good stories a month of how people found this 'new collaboration' 'useful and what it meant in their own professional success. These stories were widely publicised across the company.

Six months after the first gathering of the champions, the CRM usage climbed to 70% and stabilised at around 85% over a year period. No re-training was needed. An informal follow up review done one year after the project had officially 'finished' ( and a new management had been put in place) showed that people considered 'collaboration' as a key competence of the company and that the original process had contributed to a better culture. Although impossible to correlate, people turnover had also decreased significantly since the champions started their informal work with peers.

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