

# Sales Operations Forum

## Sales Enablement—Emerging Technologies That Make An Impact

Citrix, WebEx and FileNet—all early adopters of sales enablement technologies—have raised sales effectiveness by risking investments in emerging sales collaboration, social networking, and automated proposal generation. Deployment posed challenges such as allocating resources, sales and marketing cooperation, and delivering early success, but each has seen an improvement in sales productivity.

**Sales collaboration:** Citrix typically responds to partner inquiries within two hours. Using a sales knowledge base enabled by StreetSmarts, Citrix captures what they call “informal and tactical information,” and gains critical insights into knowledge gaps of channel partners. [www.StreetSmarts.com](http://www.StreetSmarts.com)

**Social Networking:** WebEx employees had contacts at 95 companies on the Fortune 100 list; Visible Path provided them a system for identifying and leveraging those relationships. [www.visiblepath.com](http://www.visiblepath.com)

**Proposal Generation:** FileNet’s sales team spent countless, unproductive hours locating or creating content for proposals. Now, using Pragmatech’s proposal automation product, unproductive time is largely eliminated so sales teams can focus on customizing proposals to match customer needs. [www.pragmatech.com](http://www.pragmatech.com)

### Sales Collaboration at Citrix Systems

Building world class partnerships with industry leaders is a central component of the Citrix business strategy. But Citrix was rapidly expanding its product offering through acquisition and new development, which challenged partners to “keep up” with changes.

Before Citrix deployed StreetSmarts, partners typically received an answer within 36 hours of sending Citrix an inquiry. Keeping partners up to speed, and ensuring they knew when and how to sell the broad Citrix product line, was time consuming and expensive.

Now Citrix guarantees partners a 24-hour response time, but typically beats that expectation by responding within 2 hours. Mike Fouts, Citrix Channel Sales, says that StreetSmarts, by Involve Technology, enables Citrix to provide 1,300 partners with a knowledgebase of solution, product, sales strategy and program information. StreetSmarts serves as a front-end to several existing repositories of information. Partners can browse information by category and other attributes. They can ask questions and receive an immediate answer if one already exists, or transparently deliver the question to the right experts if the answer does not exist.

The knowledge base is integrated with Outlook, so partners and Citrix staff send questions and

receive answers via email. An unexpected benefit is the insight Citrix has gained into partner knowledge gaps.

Citrix deployed StreetSmarts in December 2005, and by July had 1000 partners online. Need proof of the value to partners? 57% of partners use the system at least one time per month.

The screenshot shows the Citrix StreetSmarts forum interface. At the top, there's a navigation bar with links like 'home', 'add advice', 'ask', 'forum', 'promotions', 'standards', 'directory', 'help', and 'logout'. Below that is a search bar and a 'GO!' button. The main content area displays a post by 'Bill Pearce' titled 'Free TS-CAL Entitlement'. The post text discusses Microsoft's licensing changes for Windows Server 2003 and Terminal Server, mentioning that users can claim free TS-CAL for desktop licenses purchased before April 24, 2003. The post includes a 'Usefulness' rating of 5 stars and a 'Category' of 'Selling Resources > Alliances > Microsoft'. At the bottom of the post, there's a 'Rate It' section with a 5-star rating and a 'Did this help you move the sale forward?' checkbox. Below the post, there's an 'attachments' section with one attachment titled 'http://www.microsoft.com/windows... Website Link'. A 'comments' section is also visible, but it says 'No comments have been made for this advice'.

*"StreetSmarts offers our channel the same qualities we value in our own software: higher productivity, greater business agility and faster access to information that truly makes a difference." Bill Burley, AVP Channel Sales, Citrix*

[www.StreetSmarts.com](http://www.StreetSmarts.com)

## Social Networking at WebEx

Dave Berman, VP of Sales at WebEx, began his presentation with a WebEx description: 64% market share, 23% year-over-year revenue growth, and wins at more than 22,000 customers. And yet, Dave identifies his biggest job challenge as accelerating revenue growth. Penetrating strategic, targeted accounts is a critical component of his growth strategy.

Using Visual Path, WebEx has been able to tap into and leverage informal and executive relationships that were never accessible before. To illustrate the value that the WebEx network provides, David revealed that by using Visual Path, WebEx was able to launch a "No Fortune Left Behind" campaign. Their existing network yielded contacts in 95% of the Fortune 100; 81% of the Fortune 500 and 40% of the Global 2000.

Usage of Visual Path has illustrated to WebEx that a high percentage of valuable connections come through business and social relationships where CRM systems offer no visibility. Using Visible Path, WebEx is able to map billings against some of the companies where they had the strongest relationships and uncovered several large opportunities.

Visible Path noted that their system enables a degree of anonymity giving access to people's networks without invading privacy or compromising relationships. It also provides users the ability to "untether" their personal relationships when they leave their employer. WebEx warned that the success of social networking technology is dependent on sales teams gaining quick access to connections that yield introductions into targeted accounts.

## Proposal Generation Automation at FileNet

When FileNet surveyed their sales team about the quality of their "selling" documents (RFP's, presentations and proactive proposals), they got clear but disappointing results:

- 83% said FileNet's documents did a poor or average job articulating FileNet's value proposition

- 92% of the FileNet sales team said their proposals were poor at differentiating FileNet from the competition.
- 84% rated FileNet proposals as average or poor in overall quality and effectiveness.

FileNet was distressed to find that not only was the quality of their documents low, but their process was inefficient; their sales team spent 53 hours per month on non-value-add activities.

Mark Jones, FileNet's Sales Enablement Manager says that using Pragmatech's Proposal Automation tool, they have been able to cut the time in half that the sales team spends creating proposals. They have also been able to drive up the quality of their selling documents. One of

FileNet's 400 proposal system users worldwide described the tool as, "... the most successful, practical valuable tool provided for the sales community in my 13 years at FileNet!"

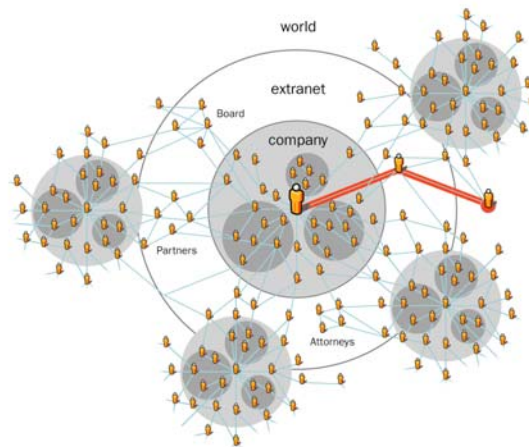
Like the other two solutions discussed at the Forum, the success of FileNet's tool depended on cooperation between sales and marketing and a disciplined process for content development and improvements. Mark also discussed FileNet's strategy to dedicate a team to assist the sales

team in locating or creating missing content. He notes this team greatly contributed to the success of their Pragmatech deployment. For more information see Pragmatech's web site: [www.pragmatech.com](http://www.pragmatech.com)

## About the Sales Operations Forum

The Sales Operations Forum provides Sales Operations executives an opportunity to network, exchange ideas and share best practices. Our quarterly meetings focus on topic such as sales effectiveness, sales methodologies, compensation, and CRM.

The Forum is managed by Price Burlington, SAP and Alison Chandless of Centive. There is no cost to join the Forum. If you are interested in attending a Forum, contact Alison Chandless at 650-315-7501.



WebEx has added 25,000 new contacts to their network in the last quarter using Visible Path  
[www.visiblepath.com](http://www.visiblepath.com)