

Track: Social

“Social Selling: The IBM Transformation”

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SUGARCON 2012

Agenda

- Summary
- Why Social Business
- Approach
- Plans
- Transformation Journey

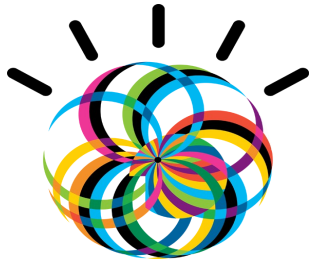


Summary

- Many companies have CRM solutions deployed today
 - A major capability of these systems is to collect data to drive sales execution (forecasting, road-mapping, *managing* sales)
 - Value to the seller is often difficult to prove although some deployments include specific capabilities aimed at the individual seller
 - Yet.... the quality of the data depends on the very individuals who may see least value in the process
- “Social Business” offer significant opportunities to change the conversation
 - New technologies and approaches
 - New mindset and ways of thinking

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Why Social Business Matters



A Social Business embraces networks of people to create business value, and activates networks of people that apply relevant content and expertise to improve and accelerate core and ad hoc processes, delivering unprecedented return for the time invested.



Engaged



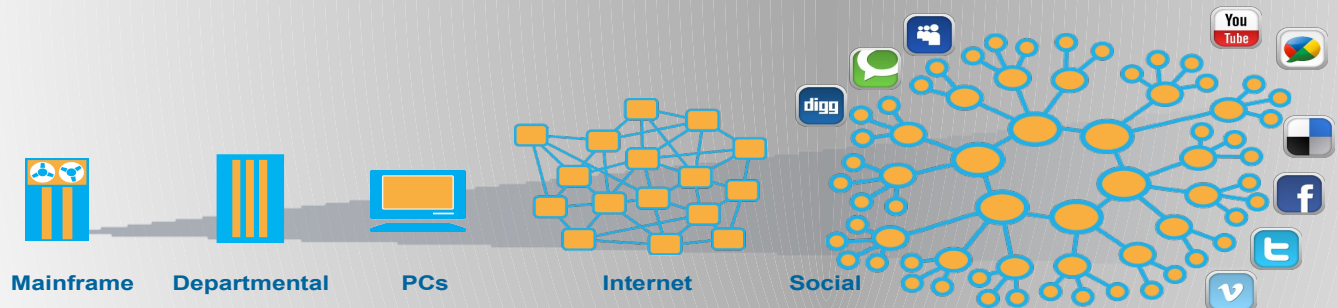
Transparent



Nimble

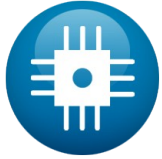
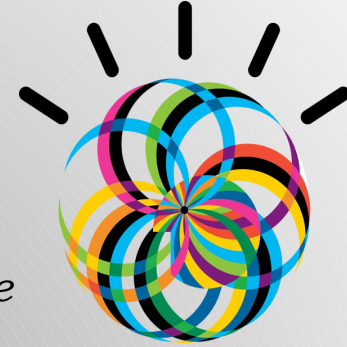
The use of digital, mobile and social media is transforming the way we interact, enabled by technology driven social interactions

- **Employees:** are using social media in all facets of their lives, including work
- **Customers:** are leading the conversations that define brands
- **Partners:** are interacting to accelerate business value
- **Organizations:** are crowd-sourcing ideas to bring new solutions to market



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The world is changing, and becoming more...



Instrumented

Smartphone shipments will outpace PCs by 2012 –
putting unprecedented power literally in people's hands anywhere they go



Interconnected

Social networking accounts for 22% of all online time –
connecting nearly every individual on earth



Intelligent

Social data analytics will grow to 1 zettabyte by 2011 –
networks of people are now intelligent and can learn from interactions and associations to deliver recommendations and take action

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Rethinking CRM at IBM

Interconnected

- Integrated working environment built around the Client and the Seller
- Transparency of information through enabled collaboration around clients and transactions
- Social tagging to improve quality of collateral and access to experts
- Leverage external social networks for improved contact data

Intelligent

- Imbedded analytics for added value to the seller and the corporation
- Analytics drawn from internal collaboration; sentiment analysis and "currency" of what's happening in key accounts

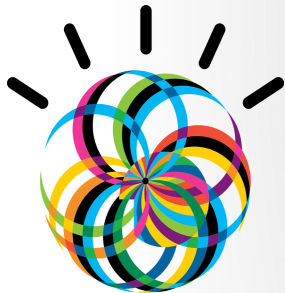
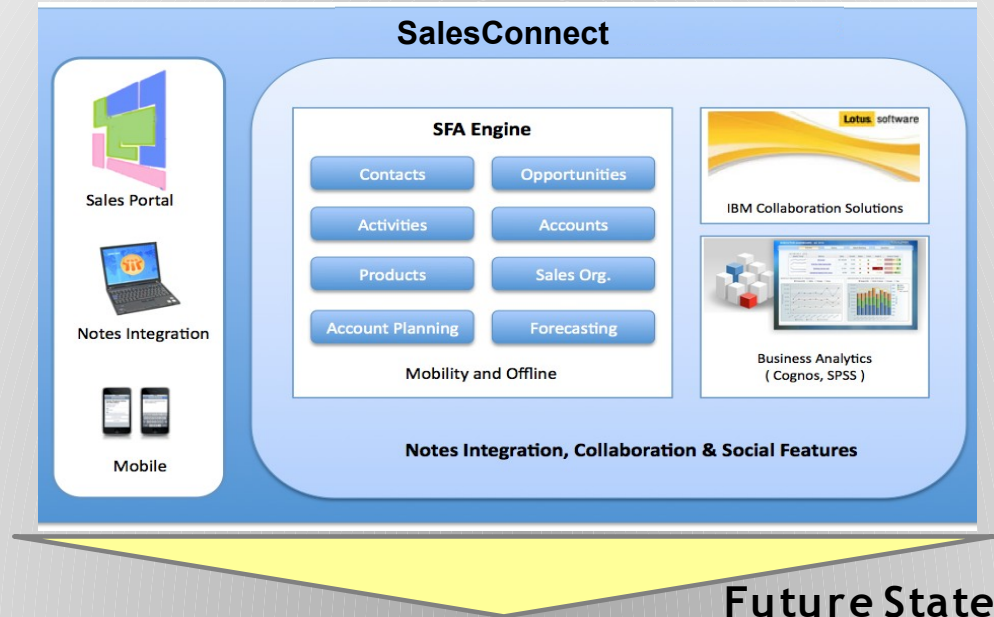
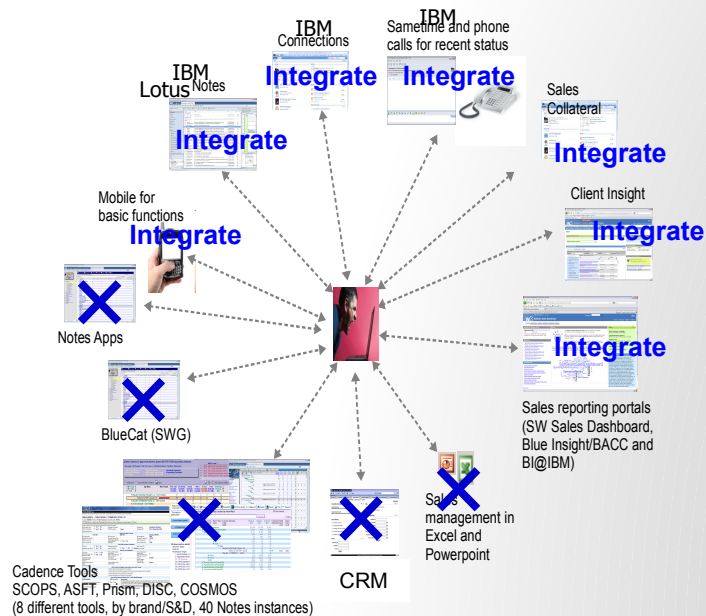
Instrumented

- Systems that look and behave like our personal web experience and our mobility preferences
- Systems that enable natural work environments and collect data as a normal course of working

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SalesConnect will support process simplification & return value to sellers through an improved user experience & technology integration

Current State



Engaged



Transparent



Nimble

- ✓ Simplified processes: Sales Execution
- ✓ Integrated “outcomes” / sales progression
- ✓ Transparency

- ✓ Real Time Data for Analysis
- ✓ Integrate with IBM Lotus Notes
- ✓ Enable social, collaboration, & mobile capabilities

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We will leverage technologies that support & enable dynamic interactions to connect people with information & insights to achieve new results

People



Employees



Partners



Customers

Networks



Experts



Communities



Groups/Teams

Interactions

Blogs

People Profiles

Tasks & Activities

wikis

Mobility

Innovative Communities

Ideation

Intranet

Extranet

File Sharing Made Simple

Social Media

Communities

Applications

Business & Social Analytics



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A new User Experience for our Sellers

Simple, Integrated, Easy to Use

- Technology enabled simplification
- Process simplification
- Sales processes enabled in a single tool
- Mobile support & offline access

Social Business Enablement

- Collaborate ('micro-blog') around Clients and Transactions
- Integrated with Social Networks
- Notes Integration enabling email alerts & Live text

Improved Client Insight

- Seller **analytics** for insight to close deals e.g., recommended content, experts
- 360 client information & insights, e.g install base, crit sits, historical revenues



The screenshot displays the SugarCRM interface for a user named Dan. The top navigation bar includes links for Home, Mail, Calendar, People, Places, and Apps. The main content area is titled 'Opportunity' and shows details for 'OMTX-1295 Renovations smarter shopping'. The interface is divided into several sections:

- Overview:** Contains fields for Description, Account, Contact, Opportunity Owner, Total Revenue, Decision Date, Sales Stage, Total Probability, and Opportunity Sales Team.
- Revenue Line Items:** A table listing offerings, quantities, prices, periodic revenues, bill dates, and owners.
- Activities:** A table listing activities, owners, types, dates, and statuses.
- Comments:** A section for sharing updates and filtering newsfeed.
- Files:** A list of files related to the opportunity, such as 'Renovations_Proposal.doc' and 'Customer briefing.wav'.
- Recommendations:** A section for similar deals, experts, and sales content.
- Cross/Up Sell Analy...**: A section for strong and possible fits.

The 'Revenue Line Items' table is as follows:

Offering	Periodic Qty:	Price	Periodic Rev.	Bill Date	Owner
WebSphere Portal	2	\$10,000.00	\$1,200,000.00	4 Dec 2010	Dan Misawa
BladeCenter	4	\$20,000.00	\$20,000.00	4 Dec 2010	Misha Thompkin

The 'Activities' table is as follows:

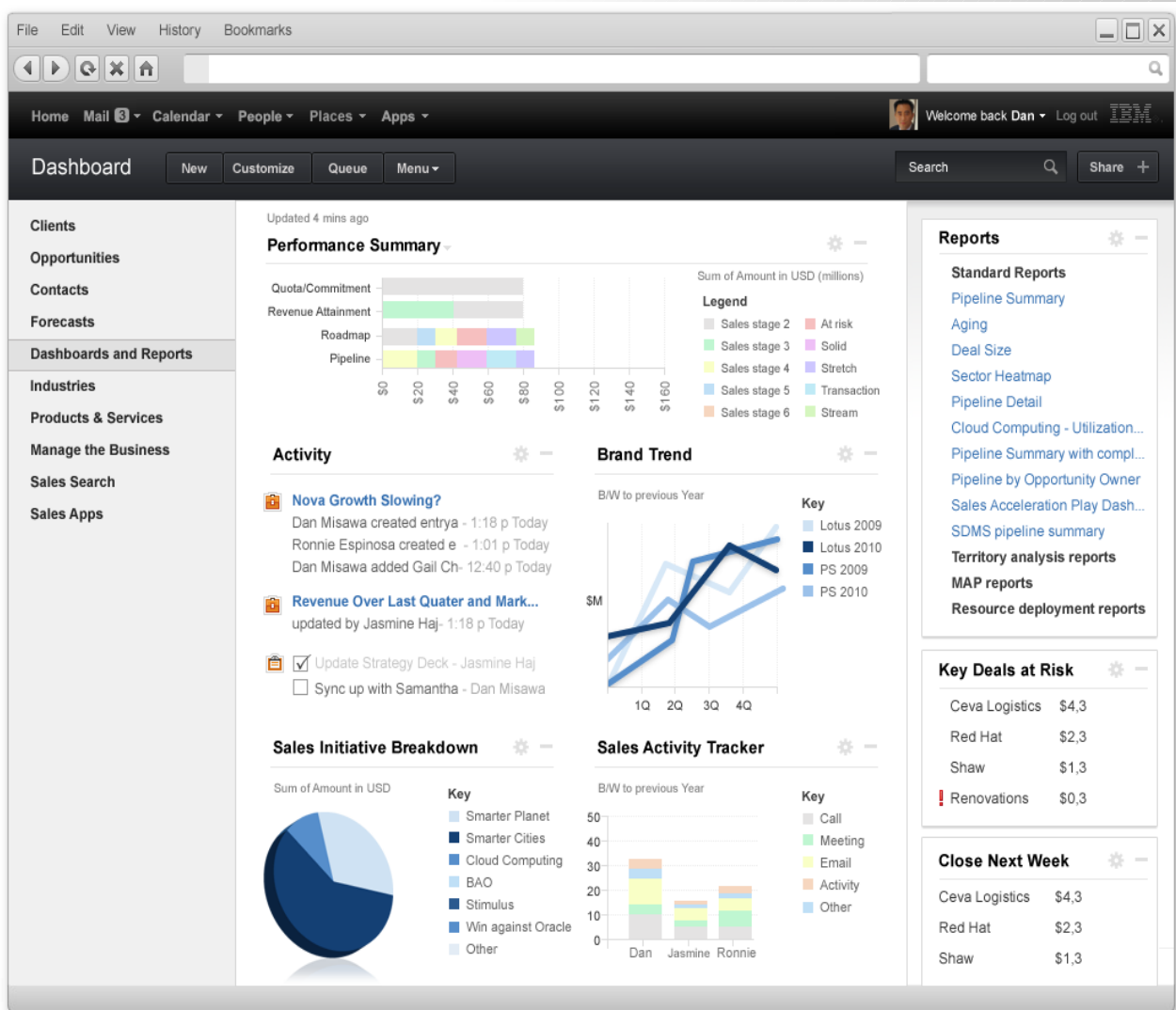
Owner	Type	Date	Status
Vijay Nehru	Client discussion	15 Dec 2010	Open
Misha Thompkin	Discussion	10 Nov 2010	Closed

The 'Comments' section shows a comment from Dan Misawa: 'Great meeting with the CIO, he wants us to meet the CFO next week. - 13:18 11 Nov 2010'.

Source If Applicable

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A new experience in up-line management of sales



Data Accuracy & Availability

- Real time insight and reporting – all sales data in single tool
- Improved “believability” of seller data derived from simpler seller interfaces

Expanded Insight

- Use of predictive analytics for improved coaching opportunities
- Use of analytics against collaborative data for insight into “what's happening now”
- Standardized automated analytics for better decision making & focused actions
- Visibility into brand roadmaps, Win Plans and Verifiable Outcomes

Ease of use and Self Support

- Streamlined and simplified UI, mobile support, and offline access
- Collaboration with teams

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Social Selling will require transformation and behavioral change

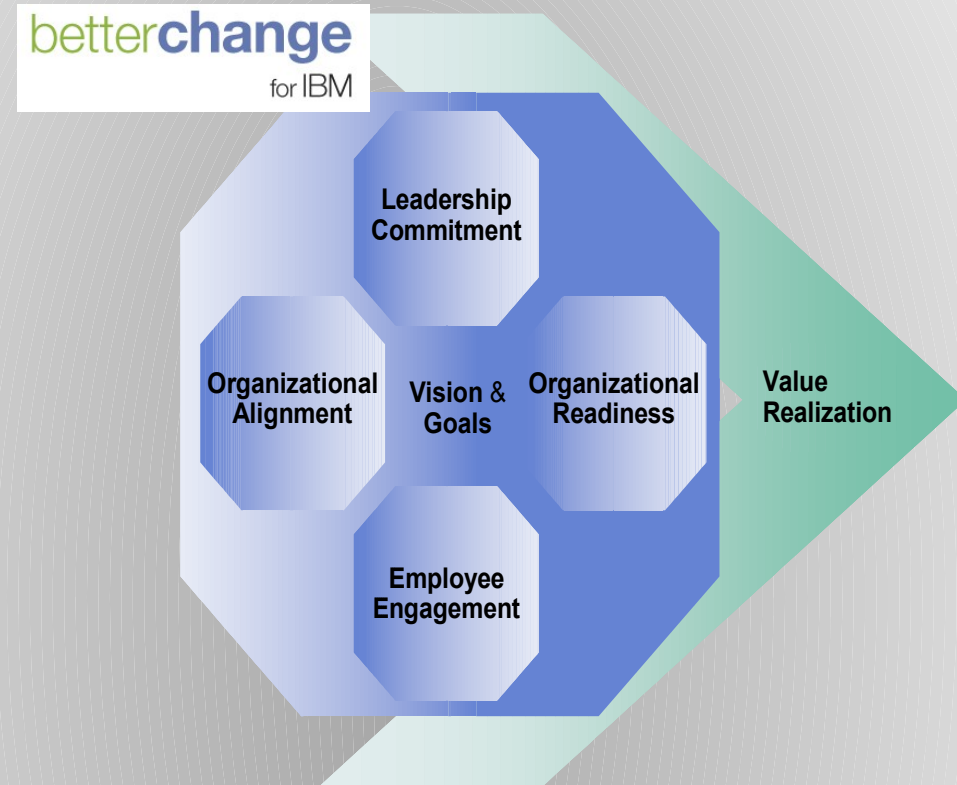
“Social Seller” Transformation Roadmap



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Our Organizational Change Management team is leading the change program and set of deployment plans to drive support and ensure adoption

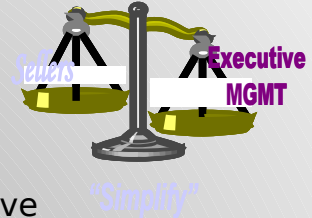
- Clearly *describe the change vision* and goals
- Actively *involve leaders* in owning the change
- *Assess change impact and plan* how change will be managed
- *Engage and prepare employees* to adopt the new way of working
- *Align the organization* and address any role clarity issues to ensure processes, tools, and performance management support the desired behaviors
- *Monitor adoption* of the change to ensure desired outcomes are realized



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A formal governance structure is in place to ensure executive support and guide overall initiative direction

Governance Levels



Executive Steering Committee

- Provides overall direction and visible leadership for the initiative
- Support and drive initiative decisions to ensure balance between seller value and management system reporting
- Provides escalation point for Executive Leadership Team as required



Executive Leadership Team

- Approves integrated design / deploy decisions
- Provides assistance in gaining initiative support and WW buy-in
- Provides business area related insights and/or SME access

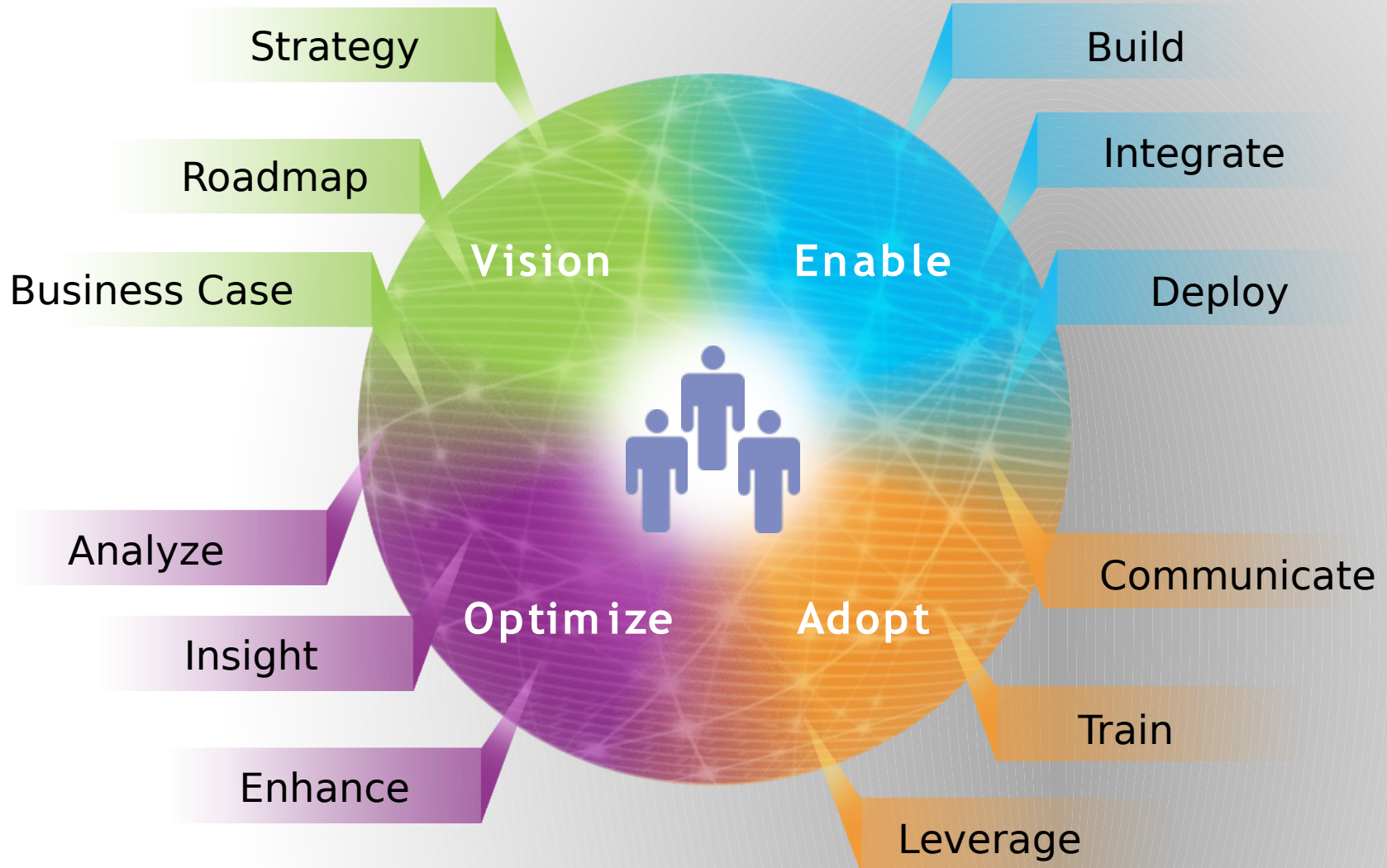


Sales Advisory Team

- Seller Community: Providing direct user input to initiative development team
- Business Unit Liaisons: Ensuring direct representation from Brands/ Business Units on project team
- Communicates seller value upward to the Executive Leadership Team

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Becoming a Social Business is a transformational journey



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We are in the enablement phase of our transformational journey around Social Business

Articulating Vision & Value

Articulate the value of Social Business within your organization, develop a strategy, roadmap & business case that reflects your organizations requirements & business needs.

Key Questions

- *How can the integration of social technology enhance the way we do business?*
- *How can we streamline the way we work with partners & customers to innovate & develop new products?*
- *How can we embrace the social media revolution to improve our reputation with customers & prospective employees?*

Adoption & Change

Help your workforce, partners and customers understand why Social Business is important & leverage it to drive greater business value.

Key Questions

- *How do we create a collaborative culture within our organization?*
- *How do we connect employees with a globally distributed workforce, multiple languages and time zones?*
- *How do we enable our employees to feel comfortable and valued through sharing their knowledge for others' benefit?*

Enable the Social environment

Build your Social Business environment, establish organizational and people capabilities, select technologies and integrate them into your existing business

Key Questions

- *How do we create an integrated innovation platform that enables collaboration among our employees, partners and customers?*
- *How do we integrate social capabilities within our existing business systems and processes?*
- *How do we understand and mitigate the risk of using social technologies and establish policies and procedures that ensure effective usage?*

Optimizing Insight

Optimize performance through convergence of Business Analytics & Social Business. Leverage insight gained to enhance your social business

Key Questions

- *What are our customers saying about us?*
- *What is prevailing sentiment of our employees & what can we do to address issues before problems materialize?*
- *What business opportunities can we identify through analysis of our internal and external social interactions?*
- *How can we predict customer behavior?*

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Thanks for your time and
attention!

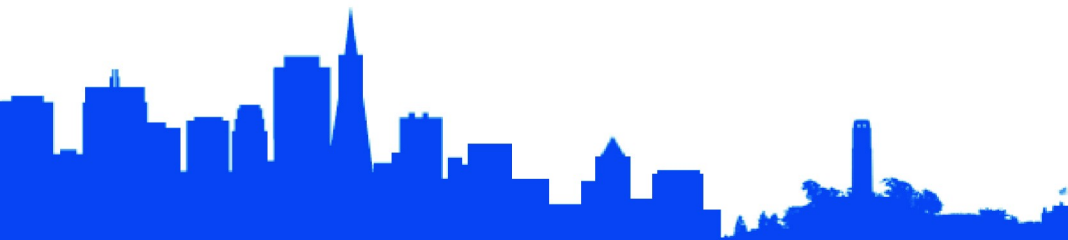


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- 1) Tap on this session
- 2) Tap on survey
- 3) Submit your feedback

*Prizes for attendees who submit session feedback using the Mobile App





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