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Why is my sales force automation system failing?

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Abstract Sales force automation (SFA) is the use of software to automate sales tasks, including sales activities, order processing, customer management, sales forecasting and analysis, sales force management, and information sharing. An SFA system is often part of an enterprise-wide information system that connects and integrates sales activities with the organization's other operations. Therefore, SFA software is not only a tool critical to the success of today's sales force, but is also vital to the entire organization. SFA has the potential to empower companies to more efficiently manage their sales force and sales processes, to automate and standardize sales activities, and to connect the sales force with the rest of the organization. The value of these potential benefits in terms of lower costs or increased revenues has encouraged businesses to adopt SFA. Once adopted, however, SFA systems often fail to deliver anticipated benefits. The leading cause of SFA failures has been revealed as low user acceptance, which can be attributed to such factors as the disruption of established sales routines, sales force perception of the system as a micromanagement tool, differences in sales force and managerial expectations for the system, and lack of managerial support for the system as perceived by the sales force. Given these circumstances, managers who are aware of the major issues surrounding user acceptance of SFA will be more successful in implementing such systems. This article explores the utilization of SFA, the benefits derived from these systems, and user acceptance issues. Herein, we offer suggestions that will help organizations succeed in adopting SFA systems.

1. SFA systems and the organization

In effort to remain competitive, many sales organizations have implemented sales force automation (SFA) systems. In 2000, the customer relationship management (CRM) software market totaled nearly $13 billion, and SFA systems accounted for $2 billion of this (Agnew, 2000). These SFA systems enhance sales force management by automating a variety of sales activities, in order to improve productivity and reduce costs. As such, an SFA system is highly integrated with the information technology (IT) systems across the entire organization.

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SFA systems offer many attractive features, including sales office automation, integration of the sales force with other units in the organization, standardization of sales activities, and more effective and efficient management of the sales force. The potential benefits of the system include reduced costs, enhanced productivity, increased closing rates, better information flow within the organization, elimination of duplicate databases, better collaboration between the sales force and production units, more flexibility with customer services, ability to share best practices, ability to reassign leads that have not been acted on, and more effective management of the sales force. SFA can also improve the sales process by creating cross-selling, up-selling, and push-selling opportunities. Although organizations frequently invest in SFA systems to achieve these benefits, many of them often do not occur (Technology Marketing Corporation, 2004). In this situation, it is not uncommon to hear the refrain: "Why did the anticipated benefits of our SFA system fail to materialize?"

The experience of a large national organization that recently invested a substantial sum of money in an enterprise-wide SFA system puts this issue in context. The organization's objectives were to better manage its sales force and improve the efficiency of its sales activities. Prior to the implementation of its SFA system, the organization primarily used a paper-based approach to managing its sales processes and its large, geographically dispersed sales force. The organization's newly implemented SFA system was intended to provide the salespeople with sales leads, and a wealth of information on these individual leads. The system also enabled the salespeople to give customers information on products, product availability, and delivery dates, and closing details on the sale. With respect to sales management, the system provided managers with real-time information on the activities and performance of the sales force.

The organization followed standard industry practices for purchasing and implementing an information technology system. This included forming a work group of potential users to determine system requirements, training all users, and supplying the appropriate technology for using the system. However, 6 months after implementing the system, it was found that less than 50% of the sales force was actually using it. Many of the salespeople were unhappy with the system because they thought that, in general, the costs of using it outweighed the benefits. Thus, they were unwilling to use the system to perform their job activities. Given this reality, low user acceptance emerged as the leading reason that the organization failed to realize the full benefits of adopting an SFA system.

A careful analysis of the system implementation identified four major factors contributing to low user acceptance: (1) the SFA system required a change in established sales routines, (2) the sales force perceived the system as a micromanagement tool, (3) the sales force and management had different expectations of what the system would do, and (4) there was a perception that senior management failed to show strong commitment to the system during implementation.

Even though SFA systems offer many potential benefits, the adoption failure described is fairly common since these systems often entail extensive organizational change. Academic and practitioner research shows that resistance to change is a major roadblock to successful adoption of new technologies. Research in information technology adoption in general (Venkatesh, Morris, Davis, & Davis, 2003) and SFA adoption in particular (Gohmann, Guan, Barker, & Faulds, 2005; Guan, Barker, Faulds, & Gohmann, 2004; Schafer, 1997) point to lack of user acceptance as a leading cause for information system failures.

One of the main determinants of SFA success is user acceptance of the technology, which requires acceptance of a change. Since the benefits of the system often lead to change, these benefits can be a double-edged sword. As Kotter and Schlesinger (1979, p. 108) point out:

> Managers who initiate change often assume both that they have all the relevant information required to conduct an adequate organization analysis and that those who will be affected by the change have the same facts, when neither assumption is correct. In either case, the difference in information that groups work with often leads to differences in analyses, which in turn can lead to resistance [to change].

If an organization is to realize the benefits of an SFA system, it is essential that its sales force make full use of the system. This goal, however, has proven elusive for many organizations. It is imperative that managers understand the issues surrounding SFA acceptance *prior* to purchasing and implementing such systems. This article identifies and describes the four leading reasons why users fail to accept SFA systems, and offers solutions for each condition. This discussion is intended to provide management with a better understanding of SFA adoption and implementation, and thus increase the likelihood of a successful outcome when implementing such systems.

2. What are SFA systems, and why are they implemented?

SFA systems integrate software that electronically supports the major selling activities commonly performed by sales professionals. An SFA system also allows organizations to manage their sales processes and salespeople more efficiently and effectively, thereby reducing costs and increasing sales. From the organization's perspective, the chief benefit of implementing an SFA system is that it increases profits by boosting sales and lowering costs. A 2004 survey of sales managers by the Yankee Group found that the top three benefits sought when implementing SFA systems were to increase sales effectiveness, improve closing rates, and decrease sales administration costs (Technology Marketing Corporation, 2004). SFA systems achieve these benefits through more effective management of the sales process, which includes initiating, developing, and enhancing customer relationships (Ingram, LaForge, Avila, Schwepker, & Williams, 2006).

As noted previously, an SFA system generally provides the organization with four major features that may help achieve these benefits. First, it provides an automated set of tools that can help the sales force perform their sales activities more efficiently. Second, the SFA system recognizes the "boundary spanning" role of the sales force and connects it with the rest of the organization, allowing information and data to flow uninterrupted among the organization's various functional areas. Third, the SFA system offers a standardized set of tools that the sales force can use to achieve more efficiency in the sales process. Finally, it provides sales managers with more detailed information for monitoring and evaluating activities of the sales force. Collectively, these four features allow the organization to increase profits by boosting sales and lowering costs.

Expedia Corporate Travel is a prime example of a company which successfully implemented an SFA system (salesforce.com, 2008a). This travel service provider originally utilized a legacy system with Excel spreadsheets, Word documents, and notebooks to manage customer accounts and prospects. The company's goals in implementing the new system were to drive down costs, improve communication between and within sales teams, automate business processes, maintain data and security from multiple customer touch points, and provide real-time reports at all levels of the company. Each of these goals can be achieved through the features described above. Expedia implemented the system successfully and thus realized all of its aims.

2.1. Automating the sales office with SFA

An SFA system simplifies the sales process by consolidating several individual tools into one suite. These tools include electronic calendars, integrated customer databases, data on the history of past customer sales, product and inventory information, electronic mail, automated distribution and management of sales leads, and order entry capabilities. The SFA system typically provides salespeople with the ability to update leads, review customer information, and make contacts through Internet access. While servicing an existing customer, the sales professional can access information regarding prior sales activities, such as order forms and invoices; previous buying patterns; and up-to-date inventory and pricing information. One goal of this technology is to provide the salesperson with the information needed to close a contract more efficiently. At Koch Ventures, the implementation of an SFA system eliminated 80% of the time that sales representatives were devoting to the fulfillment of literature requests from customers. The time savings produced by the SFA system had the potential to increase sales by an estimated $40,000 per month (Business Wire, 2001).

The ability to access current inventory and pricing information enables the salesperson to move those products that are most available and have greater margins. It may also reduce the number of contacts required to close the sale by reducing the need to check inventory levels, pricing, and other relevant data. Accessing this data while servicing the customer gives the salesperson the opportunity to cross-sell additional products or services related to the ones the buyer is seeking, such as service contracts. This is practiced by Amazon.com, which automatically provides consumers with information on products similar to those they have previously purchased.

The ability of sales representatives to answer questions immediately can greatly improve customer relationships. Cross-selling can increase the sales revenue per sales contact, which in turn augments productivity of individual salespeople. For managers, all information about sales activities appears in a user-friendly database that can be accessed for aggregate reporting purposes and other management-related tasks.

2.2. SFA connects the sales force with the rest of the organization

SFA systems are often enterprise-wide systems, crossing multiple levels of management and functional boundaries within the organization.

These systems efficiently deliver sales and marketing information throughout the distribution channel, which increases the amount of information available at all levels in the organization, provides an integrated view of the distribution pipeline, and facilitates better coordination and collaboration between the sales force and production units. With the information provided, the production unit can adjust inventories and schedule production more efficiently, thereby reducing inventory costs. Salespeople can use the information to access inventory records, which allows them to better assign delivery dates for in-stock products, push those products which are most available, and reduce backorders.

An example where this has been successful is BOK Financial, a $21 billion regional financial services company based in Tulsa, Oklahoma. A spate of mergers and acquisitions left BOK with disparate front-office information systems. As a result, its sales and customer care processes did not integrate with its core banking system. The director of CRM said, "We needed to be able to share information within the sales teams easily and consistently, and we needed to show management an accurate pipeline." The successful adoption of the SFA technology unified the information systems among employees in all of BOK's units, including commercial lending, marketing, support, fee services, corporate trust, private banking, international services, treasure services, and investments (salesforce.com, 2008b).

2.3. SFA provides consistency across the sales force

Implementing SFA creates standardization in the activities of the sales force, thus ensuring consistency and continuity in the sales process. With the integrated suite of tools, sales managers can monitor the sales force and modify their selling routines.

In many cases, the software's selling routine is created from industry best practices. Implementing and mandating the utilization of this software gives management the opportunity to revise the selling routines to comply with these best practices, resulting in greater consistency across the entire sales force. This consistency ensures that customers receive the same sales experience, regardless of which salesperson is making a call or servicing an account. This creates an opportunity for long-term continuity in the selling process, even when turnover in the sales force occurs. When an experienced salesperson leaves the organization, the existence of an SFA system allows the replacement salesperson to immediately offer customers a comparable level of service.

For example, Lanier Worldwide Inc., an office products company, suffered 100% turnover in its sales force every 6 months. Customers had to provide each new salesperson with information on the products they required, payment schedules, and other purchasing information. After Lanier implemented its SFA system, customer information was readily available to all new sales representatives, who then became more productive and closed more sales. As a result, turnover in the sales force was reduced (Lorge, 1999).

2.4. SFA gives sales managers greater access to information

One of the greatest selling points of SFA software lies in its reporting functionality for management. Sales managers often find it difficult to adequately monitor and control the activities of the sales force. Sales personnel are routinely engaged in off-premises activities, away from the direct supervision of the manager. Information on how a salesperson services leads, pursues prospects, takes orders, and follows up on sales is often difficult to gather.

With an SFA system, as the salesperson enters information on the activities involved in each sales lead, the sales manager can view these activities as they occur. The system allows the manager to generate reports on sales activities for territories, groups, or customers aggregated over time. All the data is available at various levels of detail, which allows the manager to track the activities involved in a single sale, a sales region, or throughout the entire sales force. Having access to this data can lead to more effective and efficient management of the sales force. For example, managers can more easily reassign leads that have not been acted on for several days.

3. Four pitfalls, and how they can be avoided

Given the potential benefits, organizations are often enthusiastic about implementing SFA systems. However, these potential benefits are often not fully realized because of adoption failure. Many organizations have found the leading cause of failure to be reluctance of the sales force to accept the technology. This raises several questions. If SFA systems offer such great advantages to the sales force, why do salespeople resist the technology? More important, what can managers do to anticipate and counter this resistance?

A seminal article by Kotter and Schlesinger (1979) found that organizational change often meets with resistance. In the case of SFA, resistance of the sales force may stem from their own self-interests, misunderstanding management's motives for implementing the system, low tolerance for change, and a difference in assessments of the magnitude of the change by management and the sales force.

An SFA adoption decision can also be explained using the theories of reasoned action (Fishbein & Ajzen, 1975) or planned behavior (Ajzen, 1991). These theories suggest that an individual's decision to accept a change is a function of that individual's attitudes and behavioral intentions. If the attitudes about the change are generally positive, the behavioral intention to adopt is also positive. Venkatesh et al. (2003) used these theories to develop a unified framework for information technology adoption and applied it to SFA adoption (Speier & Venkatesh, 2002). This framework suggests that salespeople will be more likely to accept a system if they expect the benefits of the system to outweigh the effort expectancy cost to use the system. Therefore, when users do not buy into the system's benefits, they are less likely to accept it and the system implementation will likely fail (Venkatesh et al., 2003).

Empirical work in the area of SFA adoption suggests four main causes for low user acceptance: (1) SFA systems tend to disrupt established sales routines, (2) the sales force perceives a loss of control (the "Big Brother" effect), (3) different expectations exist between management and salespeople, and (4) there is a perception that management lacks full commitment to the implementation of the system. Next, each of these causes is analyzed in the context of the literature cited above.

3.1. SFA tends to disrupt established sales routines

The Problem: Sales experience and age are two factors which have been found to affect change resistance within the sales force (Gohmann et al., 2005; Venkatesh et al., 2003). For experienced salespeople, the sales process consists of a set of deeply ingrained behaviors. As such, seasoned salespeople will be less inclined to change sales routines that have proven successful in the past. Indeed, experienced salespeople are valued by the organization precisely because of their previous sales experience. For these individuals, replacing an established routine with an unproven one would be difficult to accept; veteran salespeople will likely want to continue using their tried-and-true method.

Research shows that, in comparison to their younger colleagues, older workers have more negative perceptions about information technology and use it less frequently (Morris & Venkatesh, 2000). From a human capital perspective, older salespeople will be less likely to change their sales routines, since they will not receive the benefits of this investment over as long a period of time as will their younger coworkers. Due to their tenure and experience, senior salespeople may be more likely to resist SFA because these systems offer the organization the ability to readily share the veterans' hard earned knowledge and extensive customer lists with their less experienced colleagues (Morgan & Inks, 2001).

The Solution: When purchasing an SFA system, the organization must ensure that the system has adequate flexibility to accommodate the range of sales activities performed by its sales force. In recognizing that more experienced salespeople may be unwilling to change established behaviors absent a compelling reason, sales managers should be proactive in communicating the benefits of the system to the sales force in general, and more experienced members in particular. As Kotter and Schlesinger (1979) point out, individuals often resist change because they are afraid to lose something of value. In the case of highly experienced salespeople, that "something of value" is their proven sales routines. To allay this anxiety, the system roll-out should be implemented sequentially, giving priority to those processes which are most critical in the sales function. This allows the salespeople to recognize benefits of the system with fewer disruptions to their sales routines. As system benefits become more apparent, the fear of losing something of value should be mitigated.

Sales managers should also be willing to provide features in the system as requested by the sales force. For example, when a chemical company's leading salesperson refused to use the company's new SFA system, management discussed the system with him and identified those features which would be most beneficial to him. It discovered that the system's ability to store client information, such as birth dates and names of children, was enough to bring this sales representative on board. Since he was the company's sales leader, other salespeople followed suit (Gondert, 1993). Although this solved the problem, the situation could have been avoided altogether had management dedicated more time pre-system purchase to documenting sales processes and gathering information from its sales leaders.

Finally, sales managers ought to consider offering incentives to encourage system utilization amongst the sales force. These incentives should be of significant value to the sales force, and reflect the organization's commitment to the system and company employees. To avoid the unnecessary disruption of successful sales routines, management must ensure that the SFA system under consideration has flexibility and does not represent a one-size-fits-all model.

3.2. The potential "Big Brother" effect of SFA

The Problem: Because SFA gives management access to real-time information about sales activities, the sales force may perceive that the system is allowing management to become excessively obtrusive in monitoring the sales process. Although this may not accurately reflect reality, management must acknowledge the potential detrimental impact of this perception on the implementation process. This perception is particularly important in that salespeople are independent, goal-driven employees who often resist close supervision (Jones, Roberts, & Chonko, 2000). Given these characteristics, the sales force may perceive the use of SFA as a threat to job autonomy, thus fostering the perception of a "Big Brother" effect among salespeople. As revealed via interviews we conducted with salespeople in an organization that adopted an SFA system, primary concerns included excessive monitoring and the loss of flexibility regarding when to perform sales activities.

Having access to real-time information can enable management to assign leads, transfer leads among salespeople, and immediately react to leads that have not been pursued. These activities constitute effective sales management practices; however, their execution may engender a sense of mistrust among the sales force. Kotter and Schlesinger (1979) find that few organizations have a high degree of trust between management and employees. This problem may be particularly acute in the case of salespeople, since job autonomy is perceived to be the most important factor in determining job performance and self-efficacy (Wang & Netemeyer, 2002).

The Solution: To counteract these negative perceptions, management should clearly communicate how real-time access to information will be used, and explain the benefits that the organization will reap from implementing SFA. It should also specify, prior to implementation, exactly how and when the reporting features of the SFA system will be utilized. For example, management can denote that if a worker's sales activity remains within normal parameters, then it will only be monitored on a periodic basis (e.g., weekly or monthly). Incentives for reaching predetermined sales milestones when using the SFA system may also be offered. Finally, sales managers should explain that information on the activities of individual salespeople will only be used to assist them in carrying out their work more efficiently and effectively.

New policies and procedures implemented in conjunction with SFA should reflect input from the sales force, and be revised as the system evolves. It is vital that management spell out to the letter policies regarding the transfer of sales leads, handling of new accounts and prospects, and compensation issues. Clarifying these issues in advance and responding to the sales force's concerns ought to alleviate their anxiety, and thus build more confidence in the SFA system.

3.3. Different expectations between sales management and salespeople

The Problem: According to Venkatesh et al. (2003), two types of expectations are important when implementing SFA: effort expectancy and performance expectancy. Effort expectancy represents the user's perception of the amount of work required to effectively use the system. Greater effort expectancy increases the perceived cost of using the system. On the other hand, performance expectancy represents the user's perceived benefits of the system. If perceived costs are greater than perceived benefits, the system is much less likely to be used.

Management may differ from the sales force in assessing costs and benefits of the SFA system. Kotter and Schlesinger (1979) point out that this difference in cost and benefit assessment can lead to resistance to change. Tension between management and employees is not uncommon, and may be particularly obvious in a sales organization because of the characteristics of salespeople (Jones et al., 2000).

Relative to salespeople, management tends to underestimate the effort necessary for a salesperson to effectively use the system and may overestimate the performance benefits. We performed in-depth interviews with various user groups for an organization that had adopted an SFA system. Marked differences were found in the expectations between managers and salespeople: while managers focused more on the administrative and reporting features of the proposed SFA system, salespeople were more concerned with system flexibility and higher quality information on leads.

Though effective management of the sales force is often a stated goal/benefit for implementing SFA, it can be perceived negatively by the sales force. One of the features that management focuses on—tracking sales activities—imposes a time cost on salespeople, since this requires entering data on each aspect of their sales activities. Management, on the other hand, can benefit from the new SFA system because it may reduce the amount of time required to monitor sales activities. These differences led to low user acceptance of SFA by the sales force in the organization just mentioned, which puzzled management.

Differences between management and the sales force regarding cost/benefit expectations, as well as perceived system usefulness, result in differing acceptance behaviors. Ultimately, these differences may lead to a lack of understanding by management as to reluctance of the sales force to use the system (Gohmann et al., 2005).

The SFA vendor may take advantage of these differences by downplaying the costs to sales personnel, and highlighting the system benefits for both management and the sales force. For example, James (2003) indicates that "software vendors often don't tell enthusiastic prospective customers...that more than 50% of all future CRM implementations will eventually be viewed as failures."

The Solution: Based on our experience with SFA adoption in various organizations, management may underestimate the time costs imposed on the sales force by SFA systems. In order to reduce the expectation gap between management and the sales force, managers should be cognizant of the time costs involved in adopting a new system and plan implementation timelines that will allow salespeople to fully utilize the system, and thus generate positive returns. As with any change in a business process, SFA will require a period of adjustment for personnel whose routines have been affected. Research in information system acceptance shows that if workers are given time to appreciate the benefits of the system, their likelihood of acceptance increases (Cash & McLeod, 1985).

It is important that management recognize returns on the SFA expenditure may not be realized until up to a year after the actual investment. Unlike other IT investments—such as e-commerce technology, which often offers immediate returns—SFA systems yield benefits over longer periods of time through greater use and better customer service. Therefore, managers must reassure salespeople that the SFA system will provide long-term benefits and lead to better sales performance.

To reduce the performance expectation gap between management and the sales force, management should create an environment in which salespeople can communicate best practices for using the system, and reward users who do so. When there are problems with the system, information about the problem and potential solutions should be provided immediately to users through organizational blogs or website pages. Managers need to keep salespeople apprised of how the system is affecting the bottom line, and identify salespeople who are using the system successfully.

Finally, management must be willing to make changes in the system and ask salespeople what specific needs the SFA system can fulfill. Responding to these needs can greatly reduce the performance expectation gap between management and salespeople, and increase the likelihood of sales force buy-in.

3.4. Perceived lack of commitment by senior management

The Problem: Although management may choose to implement an SFA system and commit substantial resources to that endeavor, it may yet fail to successfully market the system internally. This is often misinterpreted by the sales force as a lack of support for the system, and can result in a "why bother" mentality amongst salespeople. Commitment from senior management is essential to the success of any software implementation project (Applegate, Austin, & McFarlan, 2003). As Rogers (1995) indicates, the acceptance of an innovation is greatly influenced by stakeholders in the social system. Buy-in is more likely to occur if senior management signals the importance of the system to the organization through commitment of sufficient resources and leadership. Without this buy-in from the sales force, any potential benefits realized from the system will be lost as users abandon the effort.

Given the enterprise nature of an SFA system, it must be integrated across several organizational boundaries. As a result, users other than the sales force—such as manufacturing or warehousing—may also experience a change in their processes. For these users, the technology confers limited benefits, but added costs. If senior management does not champion the system to these user groups, then these users might not fully support the system, leading to a reduction in its level of realized functionality.

The Solution: Many organizations adopting SFA systems do not effectively market the system within the organization. This internal marketing effort should include a program whereby senior management promotes the system to the sales force and educates these users regarding the multiple benefits of the system. In addition, internal marketing efforts should extend beyond the sales force to the entire organization.

Commitment from senior management, that which extends beyond simply funding implementation of the system, cannot be emphasized enough. By establishing well-thought-out goals and pledging the resources necessary for successful implementation, management can positively influence acceptance of the system by salespeople. This process begins with the management team's buy-in to the system. Managers should be vocal champions of the effort, publicizing features and functionality through organizational communication mechanisms. They can also offer incentives to those salespeople who most effectively utilize the system, and reward top performers. In addition, managers should participate in training and orientation sessions to demonstrate their commitment to the importance of the system to the organization.

For users other than the sales force, management must not only signal its commitment to the initiative, but also stress the importance of this group fully participating in the system. Providing incentives in this instance is more difficult. Making use mandatory is one approach, but this often adds to resistance and can create resentment toward the sales force. Kotter and Schlesinger (1979) indicate that agreement and negotiation are important when groups disadvantaged by the change have the power to resist. Managers need to be realistic in assessing the resistance, and sensitive to the fact that some users have little to gain. It is imperative that they educate these users regarding the overall benefits to the company, as well as the tradeoffs.

Organizations implementing SFA systems must be aware of the challenges inherent in establishing user acceptance. Many organizations tend to place excessive focus on implementing technology, without a thorough understanding of how that technology may affect end users. This is especially true in the case of SFA because it often alters established sales routines. An important lesson learned over the years is that users are the most critical element in the successful implementation of these systems. Simply stated, user acceptance ultimately determines the success or failure of an SFA system.

4. Power through proaction

As discussed herein, SFA systems offer organizations several compelling benefits; chief amongst these are automation of the sales office, standardization of sales processes, seamless integration with the enterprise information system, and more effective management of the sales force. These benefits have remained elusive for many adopters, however, and low user acceptance is a major cause for adoption failures.

Four main causes for low user acceptance—disruption of established sales routines, the "Big Brother" effect, differing SFA expectations between management and sales, and perceived lack of commitment by management—are to blame. Thankfully, potential solutions exist for all and are within management's control. By providing SFA users with information, incentives, assurances about the system, and meeting user requirements, management can increase the likelihood of successful system adoption.

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