



# HOW TO BRING A SALES PERFORMANCE MANAGEMENT (SPM) PLATFORM TO YOUR ORGANIZATION

A Complete Guide

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## ABOUT THIS GUIDE

This guide will clearly explain how to:

- Identify the need for SPM software at your organization
- Build buy-in for new software implementation
- Map out a 10-step plan for how to implement SPM software start-to-finish

# IDENTIFYING THE NEED FOR SALES PERFORMANCE MANAGEMENT SOFTWARE IN YOUR ORGANIZATION

Identifying the need for sales performance management software in your organization involves assessing the current sales processes and identifying pain points or areas for improvement. Here are the steps to help you identify the need for sales performance management software:

## What is Sales Performance Management software?

Sales Performance Management (SPM) software is a type of business software designed to assist organizations in managing and optimizing their sales performance. It provides tools and features to help businesses streamline their sales processes, track and analyze sales data, set and monitor sales goals, and motivate and incentivize sales teams.

## What are some of the major tools of SPM software?

- Sales Analytics
- Territory and Quota Management
- Incentive Compensation Management
- Performance Monitoring and Coaching
- Gamification and Motivation
- Sales Forecasting and Planning
- Integration and Automation

## IN THIS GUIDE, YOU'LL LEARN:

How to identify the need for SPM software at your organization

How to build buy-in for new software implementation

How to execute a 10-step plan for how to implement SPM software start-to-finish



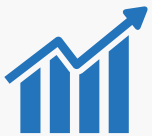
### **Review current sales processes**

Start by reviewing your organization's current sales processes from lead generation to closing deals. Understand how your sales team operates, what tools they use, and how performance is measured and tracked. Identify any inefficiencies, bottlenecks, or gaps in the existing processes.



### **Engage with sales team and managers**

Engage with your sales team and managers to gather their feedback and insights. Conduct interviews, surveys, or focus groups to understand their challenges, pain points, and areas where they feel the sales process can be improved. Ask specific questions about the tools and systems they currently use and if they face any limitations or frustrations.



### **Analyze sales data**

Analyze sales data to identify trends, patterns, and areas where performance may be lacking. Look for metrics such as conversion rates, average deal size, sales cycle length, win rates, and individual sales rep performance. Identify any recurring issues or performance gaps that could be addressed with better sales performance management tools.



### **Identify key pain points**

Based on the feedback from the sales team, managers, and the analysis of sales data, identify the key pain points and areas that need improvement. These pain points could include challenges in goal setting, tracking performance, managing incentives, providing coaching and feedback, or generating accurate and timely reports.



### **Assess scalability and growth requirements**

Consider your organization's scalability and growth plans. If you anticipate an increase in the sales team, expansion into new markets, or the introduction of new products or services, evaluate whether the existing processes and tools can support that growth effectively. Determine if sales performance management software can provide the scalability and flexibility needed to support your future goals.



### **Evaluate competitive landscape**

Research the competitive landscape and see if other organizations in your industry are using sales performance management software. Identify any emerging trends or industry best practices related to sales performance management. This evaluation will help you understand the benefits and competitive advantages that such software can provide.



### **Consult with relevant stakeholders**

Consult with relevant stakeholders, including sales leaders, managers, and IT staff, to gather their input and perspectives. Discuss the pain points identified, the potential benefits of implementing sales performance management software, and any concerns or considerations that should be taken into account.



### **Prioritize and quantify potential benefits**

Prioritize the identified pain points based on their impact and urgency. Quantify the potential benefits that could be achieved by addressing these pain points through sales performance management software. Consider factors such as increased productivity, improved performance, enhanced sales forecasting accuracy, better visibility into key metrics, and streamlined processes.

# How to build buy-in from members of your organization in order to bring in SPM software

**Building buy-in within your organization is crucial to successfully introduce new software. Here are the steps to help you build buy-in:**

- 1. Clearly define the value proposition:** Start by clearly articulating the value proposition of the new software. Explain how it aligns with the organization's goals and strategic objectives. Highlight the benefits it offers, such as increased efficiency, improved productivity, cost savings, enhanced customer experience, or competitive advantage. Present a compelling case that demonstrates why the software is necessary and how it will positively impact the organization.
- 2. Identify key stakeholders:** Identify the key stakeholders who will be affected by the implementation of the new software. This may include executives, managers, department heads, end-users, IT staff, and other relevant parties. Understand their needs, concerns, and priorities related to the software. Tailor your communication and engagement strategies to address their specific interests.
- 3. Engage stakeholders early on:** Involve stakeholders in the decision-making process from the beginning. Seek their input and perspectives to make them feel valued and included. Create opportunities for open discussions, workshops, or presentations where stakeholders can provide their insights, ask questions, and express concerns. This engagement fosters a sense of ownership and encourages buy-in.
- 4. Communicate benefits and ROI:** Clearly communicate the benefits of the new software to stakeholders. Explain how it will solve existing challenges, streamline processes, or enhance outcomes. Use concrete examples, case studies, or pilot projects to illustrate the potential return on investment (ROI) and positive impact. Quantify the benefits whenever possible to make a compelling business case.

5. **Address concerns and objections:** Anticipate and address any concerns or objections that stakeholders may have. Listen actively to their feedback and acknowledge their perspectives. Provide clear and transparent answers to their questions or doubts. Be prepared to explain how potential risks will be mitigated, how data security will be ensured, and how training and support will be provided. Addressing concerns proactively helps alleviate resistance and builds trust.
6. **Create a pilot or proof of concept:** Consider creating a pilot or proof of concept to demonstrate the value and functionality of the software. Select a small-scale project or a specific department to implement the software initially. Collect data and feedback from the pilot to showcase its effectiveness and benefits. This evidence-based approach can generate buy-in from stakeholders who can see tangible results.
7. **Develop a comprehensive implementation plan:** Create a detailed implementation plan that outlines the steps, timelines, and responsibilities for the software rollout. Clearly communicate the plan to stakeholders, highlighting how potential disruptions will be minimized, and their involvement in the process. By demonstrating a well-thought-out and structured approach, you can build confidence and support.
8. **Provide training and support:** Ensure that adequate training and support are provided to stakeholders who will be using the software. Offer workshops, training sessions, or user guides to help them understand the software's features and functionality. Address any learning curves and provide ongoing support to address questions or challenges that arise during the implementation and adoption stages.
9. **Communicate progress and success stories:** Continuously communicate the progress of the software implementation to stakeholders. Share success stories, milestones achieved, and positive outcomes. Celebrate early wins and recognize individuals or teams who have embraced the new software and achieved notable results. This ongoing communication reinforces buy-in and encourages broader adoption.
10. **Evaluate and adjust as needed:** Regularly evaluate the impact and effectiveness of the software. Collect feedback from stakeholders and measure key performance indicators (KPIs) to assess whether the expected benefits are being realized. Make adjustments and improvements based on feedback and evolving needs to ensure continued buy-in and success.

# 10 Steps to Build Buy-in to Implement SPM Software

- 1 Identify the need
- 2 Build a business case
- 3 Identify key stakeholders
- 4 Communicate the vision
- 5 Involve stakeholders in the process
- 6 Conduct a thorough needs analysis
- 7 Research and select the right software
- 8 Develop an implementation plan
- 9 Train users
- 10 Monitor and evaluate

\*AN SI PARTNER LIKE CANIDIUM CAN DO THESE FOR YOU

# ARE YOU READY TO START YOUR SOFTWARE IMPLEMENTATION PROJECT?



To make the process even easier, you can involve an SI partner at the start of your process. If you're still researching independently, you can check out these other resources in order to become fully informed on the process.

## Additional Resources

### Articles

[3 Vital Resources for SPM Implementation That You Might Not Have Considered](#)

[From Chaos to Clarity: The Value of Clean Data in Software Implementation](#)

[Software Implementation Partners: 5 Trust-Building Clues and 5 Alarm Bells You Shouldn't Ignore](#)

### Downloads

[Canidium SI Partner Interview Guide](#)

[Time and Materials vs. Fixed-Fee Contracts Guide](#)

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