



Sales Calculator

The People Who Will Use This Website

The Convincer

We need to build a better Sales Calculator to get the best out of our people.

We only know what "better" is when we talk to the people who use that system. They were very happy to tell us what they liked, what they hated, and what they wanted to do.

Giving those people better tools will help them get better sales and mean we earn more money.

The Purpose

To do this, we need to understand the people who use the Sales Calculator system so that we can build something which they will use effectively.

If we do this well, we will build a product that focuses on making sure that people can work at their best, and are not frustrated, and are effective in their roles at QA. We will think like people, and solve problems like people.

If we do this poorly, we will replicate a system which replicates business processes that people tell us they don't like, are frustrating, cause inefficiencies.

The Process

Michael Wood and Beth Marshall talked to a half dozen members of the Sales team, Sales Managers, and the people who ran the System at the moment.

These were a mix of open sessions where ideas were exchanged and off the record one to ones which allowed people to say what they wanted without worrying what the Boss will think.



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The End Product

There are some things we are pretty sure we will be doing:

- Ditch Excel, built an App in The Cloud.
- Something easy to use like an Amazon App.
- Away from the office so it can be used from anywhere on our Work Phones, from Work Tablets, and from Work Laptops.

We do not know what the end product will look like, we'll find that out by building something and then allowing everyone to have a say on it. To listen to people about what they like, what they don't, and how we can improve things.

We are planning for a sixteen-week process, which means this would be ready to be shown off at Summer Conference.

The People



Mason
The Salesperson



Martin
The Manger



Sally
The Administrator

The Numbers of People



We have ten salespeople for every three managers for every one administrator.

The Numbers of Hours



Our salespeople spend thirty-two hours a week using the Sales Calculator, managers spend four, and administrators spend twenty.

Mason - 25 - Sales Licence Salesperson - Leads

New Dad Mason knows that the difference between a nice life and a very nice one is the chunky end of month bonus that he and the team can get from hitting the MIOP Target.

"Getting a sale is about knowing the (Product Sales) Portfolio. The Portfolio changes every day, you can keep on top of it, but you access to your manager for that."

"We know the Customers, we know what they want, but what (the sales calculator) needs to do is tell them what we can give them."

"The current system was made in the 1970s, you've got to be an Excel Ninja to get some things done."

"If the Sales Calc ****s up, and I miss my targets, I'm not going to be happy."



Mason - 25 - Sales Licence Salesperson - Leeds

What Mason Loves

- When he is hitting the MIOP target, and getting the rewards for that.
Mason's work, and Mason's lifestyle are based around the idea that he is working towards a bonus.
- When he is getting on with his customers.
Mason's relationships with Customers are the driving force behind his sales.
- When he feels the pressure and speed of working in sales.
Mason loves the excitement of a deal and will work as hard as we allow him to.

What Mason Hates

- Losing sales to tech problems, and feeling stupid for not being able to fix it.
Mason wants Tech people to solve Tech problems, and give him a system that works.
- Not being able to get sign off from his manager, some sales are time-sensitive.
Mason loses sales because his Manager is not always in a position to sign off a deal.

How We Make Mason Happy

- Make a Sales Calculator which keeps up with him, allows him to get sign-offs quickly, and lets him perform all the actions he needs to clearly and easily.



Mason - 25 - Sales Licence Salesperson - Leeds

Mason's Best Day Journey

When he gets his sales signed off quickly and does not have a problem with the system.

Mason Expects

Mason has grown up in a world where Mobile Phone apps just work, and you use Socials to keep in touch with your mates. He uses Jira and Office 365 at work. He expects the Sales Calculator to work in the same way all modern apps do.



Mason - 25 - Sales Licence Salesperson - Leads



Would like to...
Get a sign off within two minutes

But stopped by...
Martin not being available quickly and easily

And so...
Loses the sale

Would like to...
Be able to compare variants in sales offers.

But stopped by...
The time and effort of creating a second version of a sale licence to compare.

And so...
Is not able to offer a variant.

Would like to...
Give the best deal to his customers

But stopped by...
The Portfolio being out of date or revised

And so...
Ends up having to roll back on sales.

Would like to...
Send Sales Licences off to finance

But stopped by...
The needs to have Sally run a data cleanse because of how many errors occur

And so...
Uses Sally's time up.

Would like to...
Find the best value in the portfolio

But stopped by...
Having to make a line by line calculation on cost/value

And so...
Is not able to make high margin sales.

Would like to...
See which licences are in progress

But stopped by...
The system being all made of Excel documents with no view of each other

And so...
Has no overview of the business MIOP.

Martin - 39 - Sales Manager - Swindon

Martin came up through QA and has been a manager for five years. He feels at home here, and he knows that his hard work is rewarded. He has not missed a MIOP target at QA, but it is often a close run thing and new salespeople can make that difficult.

"I need to sign off anything in the red zone, I'd like to see anything in the amber zone, and if it is green zone I don't care."

"A lot of this business is about trust, and knowing who you can trust to not make a bad sale."

"I've got my own things to do, I can't be babysitting the sales guys every day."



Martin - 39 - Sales Manager - Swindon

What Martin Loves

- When his salespeople are able to manage themselves.
Martin's door is always open, but no one thinks it is a good use of his time if all he is doing is signing off a 0.5% reduction or helping with technical problems.
- When he is able to get quick summaries and sign-offs.
Martin needs two things to sign off a sale. A summary of differences, and a fast way of making an approval.

What Martin Hates

- Having to make every sign off on his Office Email.
Sometimes he does not have access to his email, or to the Excel documents that summarise the sale, and that causes a massive delay in signing off.
- Having to tell his salespeople that he can no more use the old system than they can.
It undermines his leadership if it seems like he can't use the system, but the system is so clunky he struggles as much as they do.

How We Make Martin Happy

- A Sales Calculator that fires him a notification about who has made the sale, what the biggest deviations from the Portfolio are, and lets him approve it with one click.



Martin - 39 - Sales Manager - Swindon

Martin's Best Day Journey

When he can do the sides of his job, he needs to focus on and allow his salespeople to do what they do best.

Martin Expects

Martin does not expect every system to be Google or Amazon and he is used to having to use cut down IT systems at work but he also knows that the current system is outdated and clunky and that it is time for an upgrade.



Martin - 39 - Sales Manager - Swindon



Would like to...

Sign off a sale quickly and easily.

But stopped by...

Having to be at his work PC for email / Excel

And so...

Has to leave Sales unapproved.

Would like to...

See the MIOP targets and levels

But stopped by...

Having to get that information from Sally.

And so...

Asks for it infrequently.

Would like to...

Be able to look at team generated licences and sales on a daily basis.

But stopped by...

Having to ask each team member to submit that information

And so...

Knows he will rob salespeople of time when asking them to do paperwork, so does it once a week.

Sally - 45 - System Administrator - Leicester

Sally has been at QA for around fifteen years and inherited the system. She learned how to use it, and how to teach it, but doing both is a distraction from the many other things she needs to do, especially when many of her problems come from Salespeople gaming the system.

"I've got a hundred things to do every day, and fixing the MIOP Requests takes time from those things."

"They have a lot of ways to get around, little tricks and snarks to hit target, and I've got to unravel that every month end."

"Managers don't know how to teach the system, they should do, but we taught them to, they just send new people to us."



Sally - 45 - System Administrator - Leicester

What Sally Loves

- When a problem is something she can actually solve.
The Sales Calculator is an Excel system built over a decade ago. Sometimes she can't fix the problems salespeople have.
- When she is able to help.
Sally wants to be able to help people, but even if she could, she is forced to spend her time on maintenance tasks.

What Sally Hates

- Three days of fixing data
Every month end, a new set of fiddles and workarounds means she has to spend two or three days cleaning and fixing data.
- Being The Office Police
Sally hates the idea that she is the Police of the Office, and she would love to be able to help people do their jobs rather than always having to tell them off for breaking things.

How We Make Sally Happy

- A Sales Calculator which she does not have to fix the outputs of or spend a long time teaching people the quirks of.



Sally - 45 - System Administrator - Leicester

Sally's Best Day Journey

When she is teaching people how to use the system rather than how to not break it, and when she does not have to spend the whole day supporting the Sales Calculator.

Sally Expects

Sally has no big expectations of the system because she has been in the fight for so long that everything has started to look like the enemy. Every system she uses at work is a bit of a pain, but this one is the worst.



Sally - 45 - System Administrator - Leicester



Would like to...

Generate MIOP reports without having to sum hundreds of documents.

But stopped by...

The system having no overview of all sales.

And so...

Spends a long time generating this information.

Would like to...

Have clean data come out of the system.

But stopped by...

The lack of validation and output unity from within Excel.

And so...

Spend a long time clearing up data.

Would like to...

Not have to think about Sales Calculator much.

But stopped by...

It being a constant problem to be fixed.

And so...

It takes up too much of her day.

What's Next

- Development will last for sixteen weeks.
- Showcases will occur every two weeks with BG, MW, AM & AH.
- Feedback will be engaged in showcases.
- The door is always open.

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