

WHITE PAPER

# Improving the Efficiency and Productivity of Field Sales Reps:

A Guide to Automating Order Management

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## Introduction

Operating a business has never been a simple task, but strong, established business processes are critical to organizations that want to go further, faster.

Modern technology advancements enable organizations to automate key steps in the business process that are necessary for growth, and one of those key steps is order management.

Though order management can be complex, the good news is that the process can be much more efficient if you have the right tools in place.

In this white paper, we'll cover the key benefits of automating the order management process and explain how the CT Orders tool can help.

# 1. The Importance of A Well-Defined Sales Process

According to the Business Dictionary, the sales process is a “set of steps aimed at initiating and supporting the identification and evaluation of likely customers (prospects), sales presentation, and successful conclusion of sales activities. It requires close coordination of people, equipment, tools, and techniques, and includes advertising and promotion.”



It’s a complex combination of skill and action, and a well-constructed sales process allows the sales reps and the company to be more efficient. It should also be noted that the larger the company, the more important it is to have a well-defined sales process.

Good business outcomes don’t just happen: they are a result of the effort you put in, so the first step in optimizing your sales process is to make sure the steps are well-defined. Your process should provide an operational guide that clarifies the actions employees must take with each prospective customer.

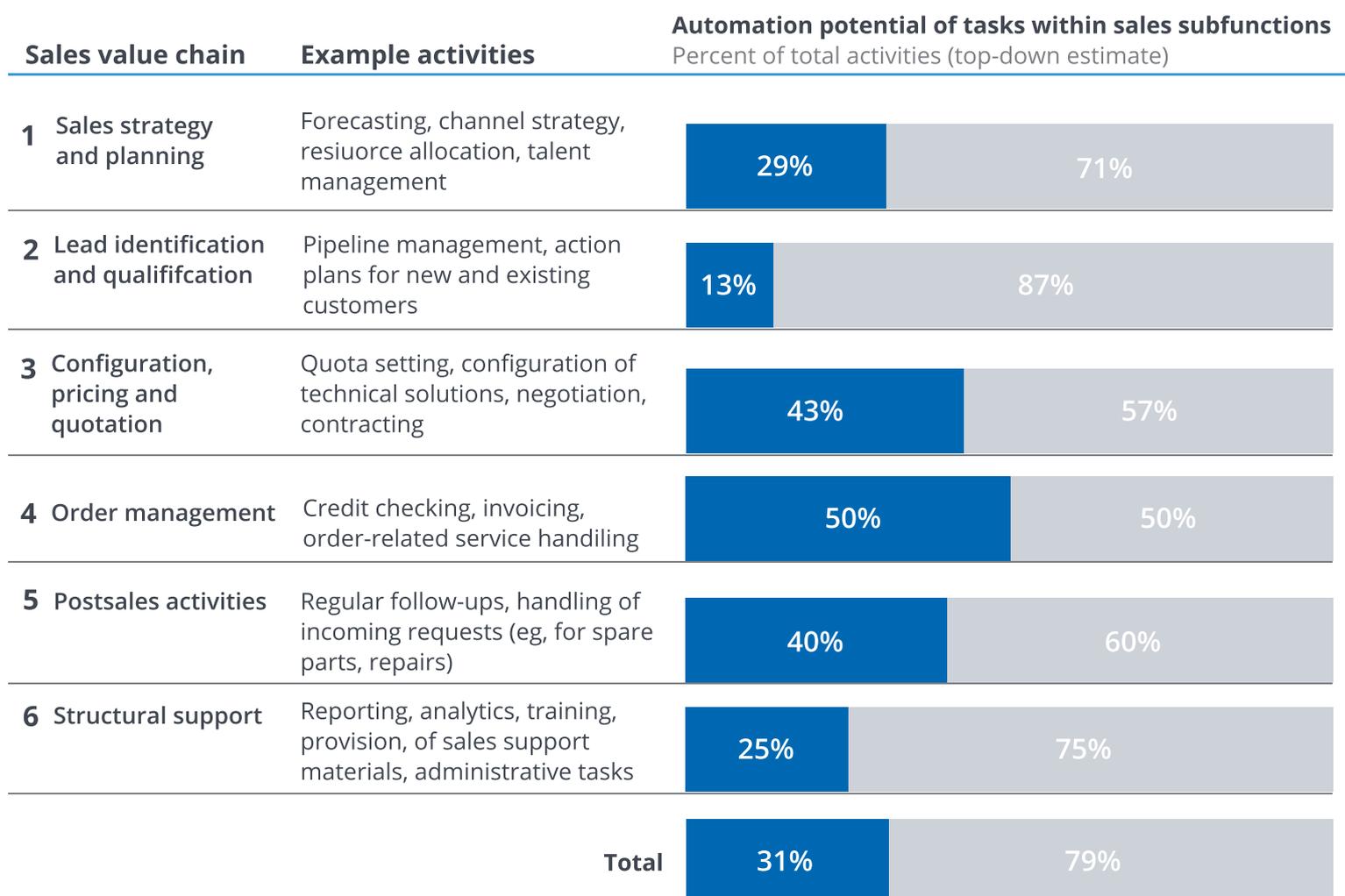
We encourage you to review it step by step in order to streamline it and eliminate unnecessary actions that do not add value.

According to Harvard Business Review (HBR), businesses with a standardized sales process see up to a 28% increase in revenue as compared to those that do not.

The complete sales process should enable a sales rep to take a potential customer from the early stage of awareness to a closed sale. It sounds challenging, but the good news is that if your process is well-defined, **many sales and sales operations tasks can easily be automated** with the right technology.

## More than 30% of sales-related activities can be automated

 Highly automatable with today's technology



Source: [McKinsey & Company](#)



## 2. The Role of Order Management in the Sales Process

If you're selling a product, you can't skip from the quote to the invoice without a few additional steps in between: you must include the **sales order form**.

We believe the sales order form is **the backbone of the sales cycle** because it:

- Serves as a contractual document that includes the conditions agreed upon between you and your client
- Allows you to reserve stock for your customer
- Promotes a smooth flow of products through the commercial cycle and up to delivery
- Creates a file with a unique sales number that includes the complete history of the sale and links all the documents relating to it
- Serves as an indicator for your purchase and replenishment forecasts

When order management and follow-up procedures are not correctly established, day-to-day business operations are disrupted, and your bottom line is negatively impacted. In fact, poorly organized order management can lead to stock shortages, minimized cash flow, and even conflict between you and your customers.

Here are the **3 most common problem areas for sales order management**, all of which can lead to missed sales opportunities and lost customers:

1

### Human error

The more complex the price list, the more common human error is. When the same product has a different price depending on the category of customers, season, or business environment, it's common for employees to make mistakes.

2

### Missing or incomplete data

Other common errors, like lost orders, an incorrect copy/paste job, or incorrect stock availability, are also problematic. The likely culprit is a lack of data centralization within your sales management systems.

3

### Lost time

A field rep relies on meetings to make sales. When they have to spend their time managing orders, it keeps them from meetings, which keeps them from selling. But when the order management process is automated, it creates more time in the day for reps to do what they do best: sell.

## 3. Smart Ways to Manage Order-Taking

Today's most profitable businesses are implementing **modern, affordable technology solutions to simplify order management**. With the right platform in place, order management can be fast, simple, and accurate. The key lies in automating and centralizing all of your sales and inventory data.

At Customertimes, we understand the ins and outs of the sales ordering process, and we've taken steps to streamline it. Our goal is to optimize order creation to make it user-friendly and maximize business value for stakeholders.

**CT Orders**, our order management solution, gives you visibility into the process so you can:

- Reduce the risk of costly human error
- Maximize results
- Increase productivity
- Save time
- Improve customer relationships

CT Orders is a combination of settings that align with your business needs. It allows for advanced sales strategies with multiple conditions, and the optional ERP integration facilitates order creation based on provided data.



**Order Type**

**Promotions**

**Discounts**

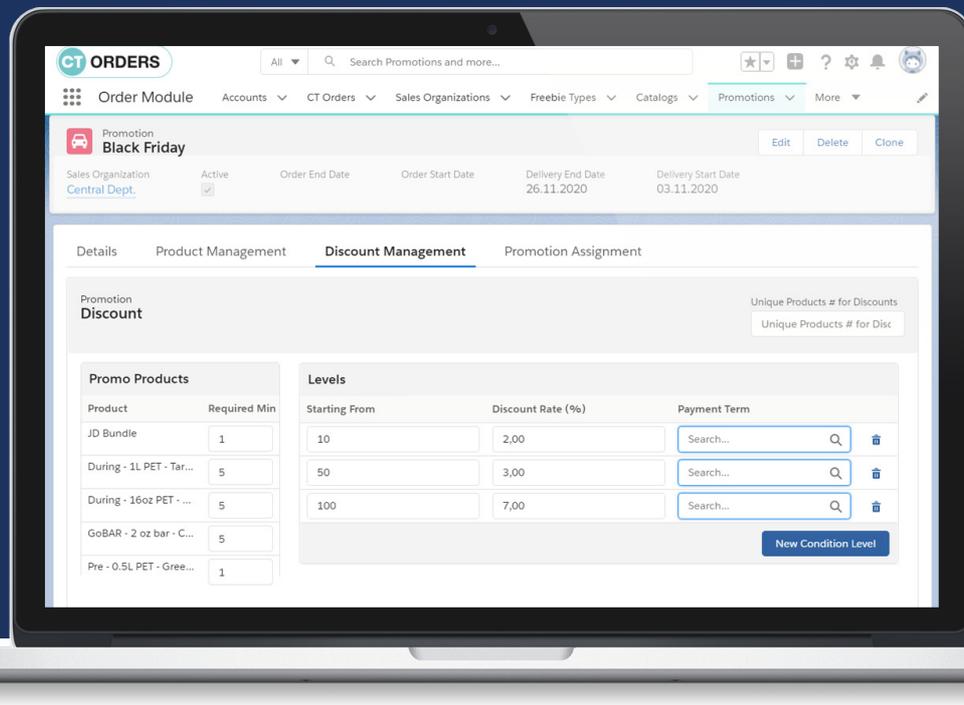
**Contracts**

**Price Books**

**Sales Organization**

Here are the benefits:

**Customize comprehensive pricing procedures,**  
long and short term promotions, and discounts based  
on certain conditions

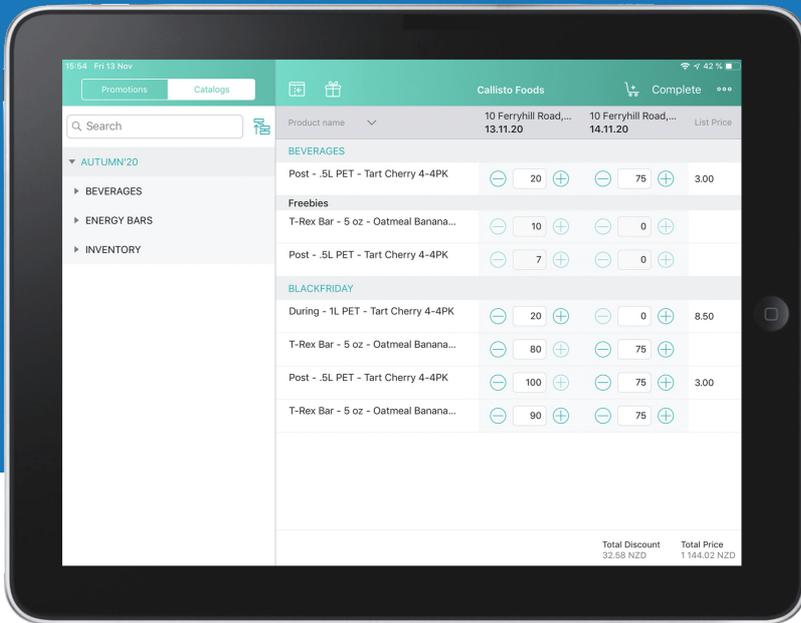


**Define your own order types**  
or use pre-configured ones to cover  
specific needs for each client

**Differentiate orders** based  
on territories and roles within  
a company, and customize the  
order page for each client

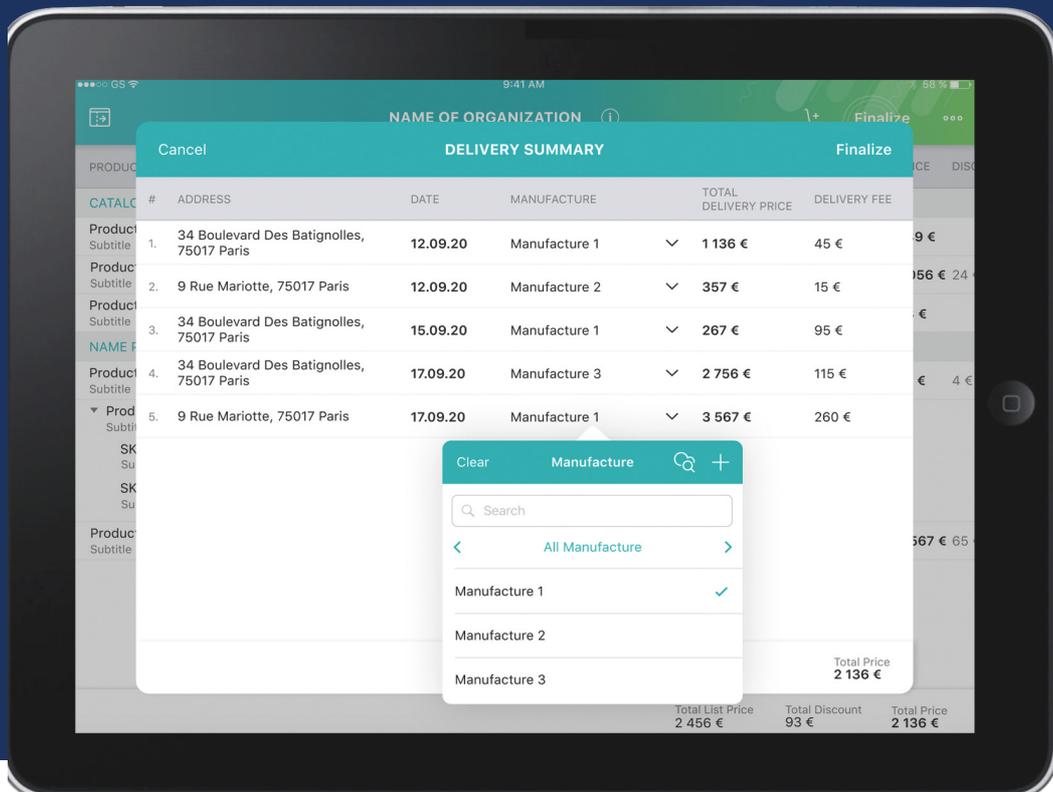
**Create bundles with multiple  
products** to sell as one pack.

**Add the same products with different price  
conditions** to the same order, for example: from an  
ordinary catalog or short-term promotion

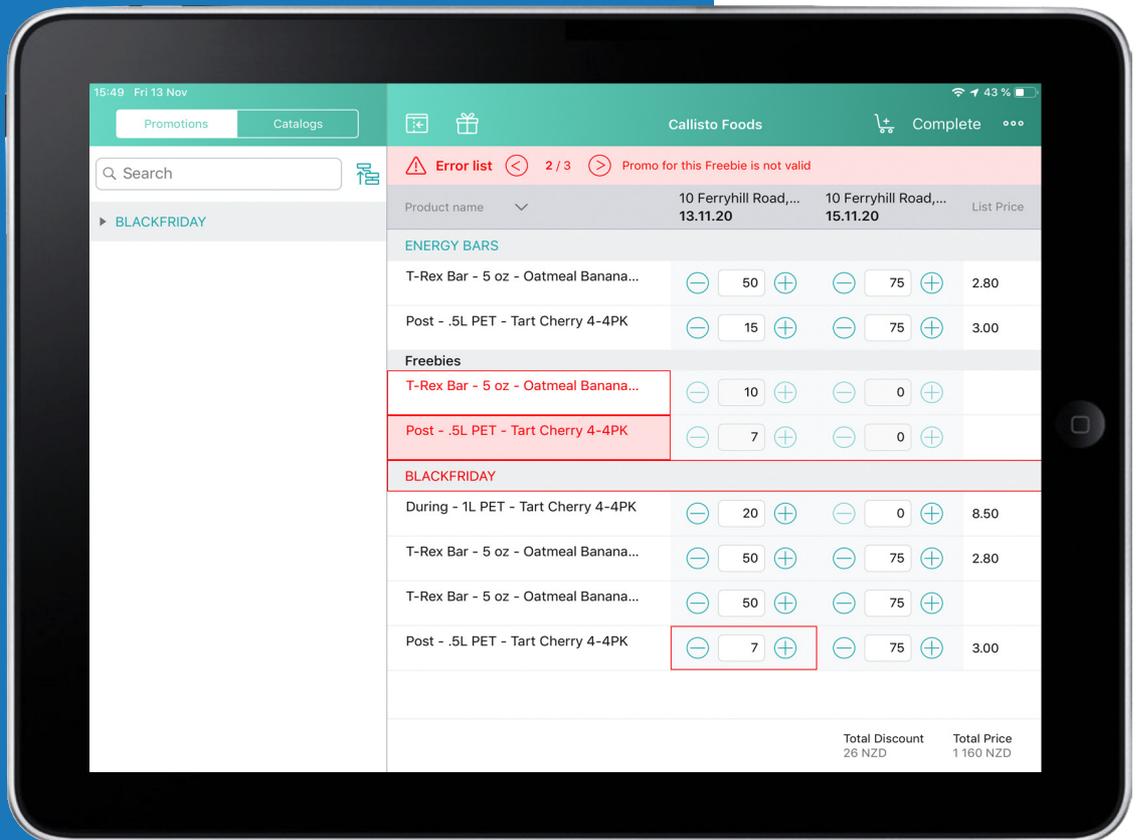


**Monitor order price calculation in real-time based on provided details**

**Create multiple deliveries** for several addresses based on available dates, product availability, and other limits



Take advantage of built-in validations to ensure the ability to correct order/delivery issues.



Use field sales teams to **create offline orders and synchronize all data from the CT Mobile app with CRM**

**Specify order statuses** or re-use pre-configured ones to build order processes according to the company needs

**Accept online orders** at the call center or provide customer access to create online orders

## Conclusion

A strong order management process saves your organization time and money and helps ensure customer satisfaction. Don't leave this critical process up to chance.

Customertimes is an implementation partner for Salesforce native applications. We can help you automate the order management process so you can reduce the risk of human error and give sales reps the time they need to make sales.

With CT Orders, you can:

- Receive and store segmented data based on specific criteria
- Manage gifts and freebies related to accounts
- Add bundles to products in an order
- Calculate invoices based on promotions, special conditions, and much more

Schedule a demo today, and let us show you how automating the order management process improves efficiency and drives your business forward.

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## About Customertimes

Customertimes is headquartered in New York City with regional offices in Chicago, Princeton, Toronto, London, and Paris, along with multiple development centers in Eastern Europe. Our highly skilled teams deliver cost-effective, optimized solutions to bring greater value to your projects.

We understand that every business is unique. Unlike other companies that expect clients to design their own solutions, we simply ask them to define the business problem. We then work with them to maximize the value of their enterprise platforms and use our insight to deliver the right solution in a timely manner.

[Contact us](#) to discuss your business goals and find out how we can help.

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