SALES FORCE AUTOMATION: A Case Study
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BACKGROUND --

Bepex   Corporation   is   an   international   company with
facilities   in   Chicago,   California   and   Minneapolis   in
addition   to sites in   Scotland, Holland and   West   Germany.
Bepex manufactures process equipment for the food and
chemical processing industries and maintains a domestic
(U.S. and Canada) sales force of nine people.

PROJECT HISTORY --

Bepex Corporation's entry into the area of Sales Force
Automation began in 1985 when the company president tasked
the Information Services Department (ISD) to investigate the
possibilities of placing micro computers in the offices of
our field sales representatives. At the time the specific
goals   of the project were vague but centered around
electronic mail and improving the processing of   call
reports.   Information on several systems was collected and
forwarded to the president but no action was taken and the
project was placed on hold in favor of more pressing needs.

In mid 1986 ISD was again tasked to evaluate possible
systems   for   the   field sales   offices.   At this time we
examined the HP Portable, the HP150, the Telecompaq and the
HP VECTRA. The VECTRA was recommended for its ability to be
a HP terminal (via AdvanceLink 2392) and its IBM software
compatibility.   By now the project was defined as trying to
improve   communications   with   the   field sales offices.
Specifically, to get call reports on a more timely basis and
respond to requests from the field and possibly, to allow
direct access to manufacturing systems and order   status   in
the HP3000 by the salesmen. Estimates of the hardware and
software costs were provided to management along with a
schedule for implementation.

In late 1986 the project suddenly moved into high gear.
Could ISD acquire at least one sample system and prepare a
presentation/demonstration   for the annual sales meeting the
following February?   Simultaneously, Hewlett-Packard was
introducing Sales Force Automation to the installed base.
Our HP salesman was aware of Bepex's interest in this area
and urged us to attend the Sales Force Automation seminar.
The success of HP test program and the transformation of the
Portable to the Portable Plus caused us to recommend to the

SALES FORCE AUTOMATION: A Case Study
0057-1

company president that we scrap the plan to put VECTRA's in the field and use the Portable Plus and HPDESKMANAGER IV. This last-minute change caused the president to seriously doubt if we really knew what we were talking about but he did agree.

The system configuration settled on was:
HP PORTABLE PLUS with 512K and built in modem
Think jet printer
Portable disk drive
Advance Mail with Reflection software
Lotus 1-2-3
Memo Maker with Time Manager
Executive Card Manager

After shopping around several sources we entered into a purchase agreement with a local HP dealership for eight systems and took delivery of one system right away for prototype development and as a demonstrator for the sales meeting.

The entire project was now more clearly defined. It would consist of two principal phases.

PHASE I:

.   Get the portables into the field sales offices.
.   Install HPDESKMANAGER IV on the HP3000.
.   Start the flow of communications between the company offices and the field sales offices via electronic mail.
.   Give the sales force additional tools in the form of the software on the Portable Plus.

PHASE II: ·

.   Additional Portable systems available for executives, managers and salesmen to use when away from their offices in California and Minneapolis.
.   A general inquiry subsystem to be written for Bepex users that will allow them to log onto the HP3000 and, in a single log-on, access inquiry screen for any Bepex software system. A kind of executive level inquiry.
.   Custom basic program for the portables that would contain proprietary formulas to be used as sales tools.

Now we had a plan and a prototype; the only other thing we needed was a couple of salesmen with the willingness, or even better -- enthusiasm, to be the beta test group. It

SALES FORCE AUTOMATION: A Case Study
0057-2

was decided to present the project at the annual sales
meeting and hope that at least two volunteers would
surface. Taking a page from Hewlett-Packard's book, the
presentation was based on a series of "What if's". What if
a salesman could directly access the order database or what
if he could have direct access to the desk of the company
president when a $500,000 order hung in the balance? What
if he could prepare customized charts and graphs based on
his customers' requirements? What if he could take word
processing, electronic mail and spreadsheet capability on
the road with him in a machine that could withstand the
everyday bumps and grinds of traveling? The response to the
presentation was much more than our expectations; out of
eight eligible candidates we had eight eager volunteers.

TRAINING --

Given the response from the field sales force we decided to
go ahead with a group of four, instead of two, for our pilot
group. The four systems were delivered to the California
facility where they were assembled by ISD and configured.
Then the systems were shipped to Chicago where the training
would take place.

The training program is eight hours of introduction to
personal, portable, computing and was segmented into three
sessions. The first session was four hours and covered the
following:
                Hardware (setup and basic operations)
                System configurations
                Memomaker
                Time manager
                Introduction to Advance Mail
At the end of the session the students were given reading
assignments and exercises to complete for the next day. The
second session was two hours and covered Advance Mail
exclusively. Most of this session was spent generating
messages, transferring them via modem to the 3000 in
California and picking up mail from the 3000. At the end of
this session the students were given additional reading
assignments and exercises. The final two hour session
consisted of an hour's review of Advance Mail and an
introduction to Lotus 1-2-3 and Executive Card Manager.

The training sessions were very carefully designed to keep
in mind that the students had little or no background in
personal computing. Careful attention was given to
terminology, specifically to define new terms and to avoid
using interchangeable terms that tend confuse new users.

SALES FORCE AUTOMATION: A Case Study
                0057-3

Now that the field personnel were trained it was necessary that they have someone to communicate with. The training of HP3000 users in HPDESK was started. Users were trained individually or in groups of two. In review, this was probably a mistake. It used a lot of time on the part of the trainer and produced results too slowly. Another problem was encountered involving the terminals. Most of the key personnel that we needed to get into the electronic mail network were using 264X series terminals. These terminals are supported by DESKMANAGER IV but not for all features. The most critical feature not supported was the function key labels. These labels are critical to new HPDESK users because they remind the user what his or her options are in any given function of HPDESK. The 2640B terminal (we had four) doesn't support the full screen edit function for entering or editing text and the users found that the subset of Editor was difficult to learn and use.

CURRENT STATUS --

At this time, seven systems have been distributed to the field sales personnel. Two salesmen do not yet have machines but they operate out of offices in California and Minneapolis where they have access to HPDESK via terminals. All HP3000 users have been trained and older model terminals have been replaced with units that support all the functions of DESKMANAGER IV. Phase II of the project has been postponed in favor of more pressing requirements for manufacturing operations. Phase I of the project is complete and is considered by all involved to be a success.

All personnel who are part of the network are required to check their electronic mail at least once each day. Portable users tend to perform this function more on the order of twice each day as they generate the most traffic.

Portable Plus users are also reaping additional benefits from the additional software packages available on the Portable Plus. MemoMaker is allowing them to perform light word processing duties and with the recent announcement of ink for plain paper this feature has become even more valuable. Executive Card Manager allows the salesmen to maintain a personalized database of their customers and contacts. Lotus 1-2-3 provides a means to calculate and plot technical data for presentation to clients and sales prospects.

USER EVALUATIONS --

SALES FORCE AUTOMATION: A Case Study
0057-4

The following are excerpts from evaluations of the Portable
Plus, Advance Mail and other software by the salesmen.

"Basically, the HP-Portable Plus System is a welcomed
addition to my office. The packaged programs have given me
flexibility in my one man field sales operation... ...my
written response time to customer requests was slower
because most responses were hand written prior to giving the
information to the secretary. This doesn't mean I don't need
a secretary, but my need is reduced by using form letters
saved on the discs and getting urgent letters out quickly."

"Telephone tag is a way of life today. The system has
allowed me to send timely messages to our various offices
without wasting time trying to get the party on the
phone..."

"The system is excellent and easy to use with the exception
of the users manuals. They are totally confusing. I found
the Commodore manuals and software manuals more easy to
use."

"Lotus 123 has been useful for Field Test Reports. Graphing
techniques and spread sheets have been helpful in preparing
these reports. However, it was absolutely grueling to learn
how to graph from both the tutor and manual. "

"Time Manager: I use Calendar for important business
followup calls. The name & address files are used for direct
dialing of important customers with info such as the
secretary's name and her extension."

"After several days of operation I would like to offer the
following comments.

The only program I've tried is AdvanceMail. This system of
transferring messages is excellent and I think it eventually
will prove to be much more than adequate in meeting our
goals of improving communications.

I know I'll put much more in writing than I tended to in the
past because I don't have to deal with a trip to the Post
Office and the subsequent 3-4 day delay in transit."

"The system meets all expectations I may have held.   If
anything, it is easier to use..."

"... system meets all expectations - is "user friendly" -
and, as a complete neophyte with computers, I've had minimum
trouble picking up operation. One area of shortcoming -
some of the manuals are hard to learn and confusing - makes

SALES FORCE AUTOMATION: A Case Study

for a lot of frustrations in mastering a feature, particularly ECM manual."

"Most useful to date - Time Manager - also like it best..."

"Time Manager: Most useful - I work more efficiently, get more tasks done in one day, etc. helps with all planning for each day, week, and long term, etc. This feature/product can organize anyone, and make them more efficient - should never miss a followup date..."

"Executive Card Mgr: Most useful - One disk stores so much. Like the ability to call up key fields for trip planning, or installation data with customers. This feature greatly enhances efforts for sales calls in key areas - shortens planning time. Also great for customer contact with autodial feature."

ISD EVALUATION --

Phase I of this project must be counted as a success. The users of the the system, those on the HP3000 and those using the Portable Plus, are enthusiastic and all agree the system has enhanced our ability to communicate between the factory and the sales offices. There were however, some areas that could have been improved upon.

1. The Portable Plus users were trained and equipped before the HP3000 users. This was clearly an error in timing. The portable users were left with all that new capability and potential but had no one to communicate with except each other. We were fortunate their enthusiasm carried them through the times they had to wait for someone to be trained to receive their messages.

2. We didn't understand the level of difficulty that would be encountered by trying to use HPDESK on 264X terminals. The delay in replacing these units hurt the project by preventing key personnel from becoming part of the system sooner. We also feel HP could have made a stronger point of just how much more difficult it is to use HPDESK on these terminals.

3   Installing and configuring the Portables was straight forward and greatly aided by the manuals and installation guides except for one area. The Reflection software bundled with the Advance Mail product is totally dependent on the batch and configuration files that are used to accomplish the various modes of mail transfer. Yet, there is only one

SALES FORCE AUTOMATION: A Case Study

documentation file on the utility disc along with
several sample files. This documentation is clearly
insufficient! An experienced user and system analyst
with more than fifteen years in data processing had a
great deal of difficulty in putting together files that
would do the job. The final result was a combination
of educated guesswork, trial-and-error, calls to the
response center, calls to other users and luck. An
inexperienced user with little or no data processing
or datacomm background hasn't got a prayer! Generally
speaking, the user isn't supposed to have to do
anything with these file anyway. It's the job of the
HPDESK Administrator. Unfortunately, the HPDESK
administrator manuals don't provide any relief either.

It is our opinion that if HP is going to sell the
Reflection software as part of a bundle that they ought
to bundle the documentation with it too. Many useful
features of Reflection remain unknown to us until we
come across them by accident. For example, configuring
Reflection on the Portable Plus to emulate the HP 2624B
instead of the HP 2392A will enable forms cache and, at
1200 baud over the modem, that is a significant
feature.

4.   When we first put this project together we had leaped
       at the chance to dazzle our customers with our high-
       tech capability by using the Portable Plus from their
       offices to check on order status or product
       availability. We have since moved away from this
       policy, indeed we now tell our salesmen to never use
       the units in the customer's office for communications.
       In most remote transfers the call goes through on the
       very first try but, through no fault of the user or the
       computer hardware, there are times when the call will
       not go through at all. Data communications via voice
       grade telephone lines has improved much in the last few
       years but it is still far from perfect. To avoid the
       acute embarrassment of being unable to make the
       connection after pumping up the customer we insist that
       our salesmen not take the chance. We do however,
       encourage them to use the stand alone features of the
       system in the customer's office if it will help the
       sale.

FUTURE PLANS --

Company management and Information Services are currently
redefining Phase II of this project. Early in Phase I we
planned for a time when Portable users would use the units
to call up the system and log-on as a regular interactive

SALES FORCE AUTOMATION: A Case Study

session to interrogate the manufacturing and order databases for information concerning their orders. We no longer view this as a desirable and, interestingly, neither do the salesmen. They prefer not to have to log-on and look up the data but would rather have a order status report, for just their orders, sent as a message on Monday mornings.

Another feature we're investigating is setting up access for the other companies who act as our sales representatives. Using Security 3000 from VESOFT, we are confident about protecting our system and applications while providing these companies with the limited access they need. While these companies would probably not be using Portables, we feel that DESKMANGER IV, with its Foreign Service Connection, is the appropriate avenue this type of data exchange.

Bepex Corporation is satisfied with its entry into this area of data processing and the value of our investment in hardware and software to support it. We view the future of the project as open-ended, continuing to evolve in tandem with the other systems we use to support our manufacturing and marketing efforts.