A Conversation with Microsoft Executive Sherri Bellefeuille About Customer Reference Management

Introduction
My name is Sherri Bellefeuille and I am part of the Microsoft Business Division within the Microsoft organization and part of the Business Solutions Sales Strategy Group. Our team is responsible for defining the business solutions sales strategy for all of our field sales teams around the world, making sure that they have the tools and the resources to enable sales success.

Why would you make customer reference management a high priority initiative?
Even though Microsoft is a well-known brand, our entrance into the business solutions space is relatively new. When our customers are going to invest in a new business solution - for example, an ERP or a CRM package, that's a fairly significant change and investment for a company. It's important that we have existing customers that are available to talk to our prospective customer so they can understand how easy it was to implement the system, what their total cost of ownership is, and how it's made them a more competitive company.

Reference management really sits smack-dab in the middle of the sales process because, for our business solution sales, we've estimated that between 85 and 95 percent of all of our sales opportunities require some type of reference activity or reference material in order to actually close the business. Having references available and easily accessible is critical to our business.

How did you justify the investment in this type of program?
Justifying the investment for a customer reference system for Business Solutions was pretty easy. If 90 percent of our prospects require a reference of some type to close the business, it's pretty easy to understand and justify why investing in a customer reference system to manage the whole process is an important investment.

If you do a little bit of "napkin map" to understand the time and effort people within our organization were investing in identifying and coordinating reference activities, we estimated it took about eight hours for us to solve a reference request, and that's probably a minimum. We figured one person calls another, and that person says, "I don't have any customers like that, but call 'Frank or Lisa", I think they do." Or they might send out an email that blankets a bunch of people. So there's a multitude of people that end up getting touched. It tends to churn people's inbox and phone calls with everybody trying to scramble to find a reference to help close a big deal. It was having a huge impact on people's ability to really get on with the business they should be doing, which was actually selling.

What type of improvement in productivity have you targeted?
Our goal is to reduce the eight hours in the old model down to ideally one email that the requestor would submit to a centralized alias, which should take only five minutes. The reference team does the work by utilizing the system, and the sales team can continue managing the sales process.

What capabilities did you feel were most important to your success?
The biggest thing that we were trying to do was create a unified, centralized place where we can track and manage the interactions we're having with a particular customer. But we also want to make sure that we're being very protective and very sensitive to our existing customers' ability and willingness to participate in the program. We might have one customer that says, "I'm willing to talk to any prospect you have. Bring 'em on," whereas we might have another customer that says, "I only want to be asked to be a reference once every six months. So please don't call me any more often than that."

The major capability I would say is really keeping track of our customers and making sure we're not over or under utilizing our customers based on their request. That's the main thing.

There were certainly some other capabilities that we were looking for in terms of tracking and managing data about our customers and centralization of process, and making sure we have unification worldwide. Those are secondary capabilities, but the main one was really about - I don't want to say "protecting the customer," but being careful with our customers, I guess, is maybe the right way to say that.

What were some of the challenges of deploying this as a global program?
Part of how we implemented this global program was looking at our organization and making some decisions about how we wanted to structure ourselves to effectively manage the program. We implemented a regional program manager in our four primary regions: EMEA, North America, Asia Pacific, and Latin America. In some cases the regional program manager is the only resource in that region. It depends on the size of the region. And also the language. Certainly the size of EMEA is quite large, but also if you think about the language diversity, when we want to call a customer to talk to them about being part of the reference program, we need to speak to that customer in their language. So it was important for us to make sure that we installed resources that were native language speakers to manage, recruit and fulfill reference requests within each of those countries.

So, for example in EMEA, we're starting with one regional program manager and seven in-country reps that will assist. We actually are able to cover 12 countries with those seven resources based on language skills. So we're getting quite good coverage with a reasonable footprint model of resources. But we felt it was really important to make sure that we're speaking to our customers in their language.

How did you go about your process of finding a system for reference management?
When we were in the early stages of rolling out our worldwide program, obviously we contacted each of our main regions and subsidiary offices to find out if anybody was doing anything or using any system effectively today. I would say for the most part the answer was Excel spreadsheets, which we love Excel and it's a great tool. But it's not necessarily super-effective for the work that we were trying to do in terms of managing customers. So we did find a great success story in our North America Region, covering U.S. and Canada - where they had implemented the Boulder Logic solution already and were having great success and high satisfaction with how the program was running. So certainly that came to the top of our list as we were looking at what we were going to use for rolling out worldwide. But we also, in addition to that, wanted to make sure we did look at other solutions, so we did an evaluation of additional software that was available on the market. We looked at the plan that the U.S. had gone through, and how and whey they selected Boulder, and then we also looked at some internal options. And really, speed to market was of critical importance to us. And so in order for us to get speed to market, and also a high-quality solution, Boulder Logic was really the natural choice for us, and it was a really great fit.

Can you speak about your interactions with Boulder Logic?
Our experience in working with Boulder Logic on the worldwide program and implementation has really been topnotch. We've had great response from the Boulder Logic community in terms of them guiding us through the path of trying to make some important decisions and them being very proactive and very involved and engaged in our process. So that was during the "program modeling stage," I guess if you want to call it that. It was very helpful to have the team involved with their expertise and experience in helping us identify stumbling blocks - we may not have made the right choices if it wasn't for their guidance. So that was a huge benefit to us.

And also during the implementation, our IT team is still amazed by the speed with which we were able to get the system up and running. You know, even our field teams were amazed at how quickly we got it done, to the point where - most of the time when systems are implemented at Microsoft, people end up putting in a buffer timeline because they don't believe we're going to meet the timeline. And we met, actually exceeded our implementation by two days. So that was a huge success in terms of getting implementation on time and on track, and exceeding people's expectations. So both on the IT side as well as the field side, everyone was quite impressed with how the implementation went.

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