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Enhancing Complex Sales: Adapting the New  
Conceptual Selling Methodology to the Salesforce  
Platform

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## **Abstract**

The purpose of this thesis is to consider the implementation of The Miller Heiman Methodology into the Salesforce environment, intending to coordinate and optimize the effectiveness of sales teams. The Miller Heiman approach is a widely known sales model, which focuses on the identification of client needs, decision-makers, and building a partnership approach based on consultative selling. This project aims at applying these principles on the functionalities offered by Salesforce, one of the most effective Customer Relationship Management (CRM) technology.

The methodology involves four key objectives: first, to outline the fundamentals of The Miller Heiman Methodology; second, to align these fundamentals with Salesforce capabilities; third, to determine the logic and business specifications necessary to address complex sales within Salesforce; and fourth, to illustrate the process with the help of the Salesforce Simple Demo Org. The project does not cover the deployment phase, nor does it go into the technicalities of how it is done, but to translate the methodology to the Salesforce platform and show it in a product demonstration.

This project is inspired by the change in sales practice from the conventional field sales to inside sales brought about by the adopting technology in sales and data analysis. Any tools that are used in sales should be able to help in the elimination of tasks, reduce the number of steps in a process, and assist the sales teams in selling. By ensuring that The Miller Heiman Methodology is implemented correctly in Salesforce, the right implementation can help to solve these problems by offering an all-encompassing training solution and enhancing the access of those decision-makers to the Salesforce platform.

Hoping to foster a strong and effective technology based sales approach within the company that will help the sales staff become trusted consultants. This project aims to implement The Miller Heiman Methodology into Salesforce.







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# Chapter 1

## Introduction

### 1.1 Motivation

The field of sales is evolving. Traditionally, sales teams have been based on outside field salespeople who make face-to-face sales calls with leads and opportunities. However, many sales organizations are transitioning from a field sales model to an inside sales model (Martin, 2013). According to a survey conducted by Steve W. Martin with over 100 vice presidents of sales at leading technology companies and business services providers, during the period of 2011-2013, 46% of participants reported a shift from a field sales model to an inside sales model (Martin, 2013).

This change is being supported by an exponential growth in sales technology and data. Therefore, a brigade of new tools are entering the market and empowering inside sales people. These tools revolve around mobile devices, advanced analytics, social platforms, cloud computing and CRM (Mandelbaum, 2017).

Nevertheless, having more technology available leads to problems around sales

teams and organizations, one of the main problems being Tech Inefficiency (Papineni, 2023). According to Laxman Papineni, Co-Founder & CEO of Outplay, sales tech is indispensable to a high-performing team, but the wrong tech investments could also be what holds sales teams back the most. Quoting Mr. Papineni, "Sales tech is meant to streamline processes, amplify efforts, run manual tasks on autopilot and allow people to actually just sell". Technologies such as Salesforce are a platform to empower sales teams'. However, without the right implementation, they can do quite the opposite Papineni, 2023.

Additionally, there are two other problems that are faced by sales teams, according to Mr. Papineni. First, sales training that is not holistic leads to salespeople who do not understand all aspects of the sales process, qualify leads and close sales (Papineni, 2023). Tech should not only help to learn, but make these processes as automatic as possible. Second, due to the increase in spam calls, emails and digital marketing, decision makers are becoming more inaccessible (Papineni, 2023). With the right technology, the process of reaching relevant stakeholders and decision makers within opportunities should become easier.

The New Conceptual Selling (Miller and Heiman, 1999) is a book written by Robert Miller and Stephen Heiman in 1999. In this book, a breakthrough selling methodology is developed, which throughout the project is referred to as *The Miller Heiman Methodology*. According to The Miller Heiman Methodology, selling is no longer about telling the customer what they want, nor showing them the product and convincing them that it is the best in the market. Selling is about being a trusted advisor for the client, working with them and understanding the solution they have previously built in their heads. Identifying the decision-makers and compelling them to buy, not wasting energy and



resources on those who do not decide. Finally, enabling a Win-Win situation with the customer, that will inevitably not only lead to a sale, but also a chance for a long-lasting relationship and multiple, upsellings and repetitive orders (Miller and Heiman, 1999).

## 1.2 Objectives

The objective of the project is to address the following question: *How can The Miller Heiman Methodology be implemented in the Salesforce platform?*

The project demonstrate the implementation of a successful and proven sales methodology in a technology used by sales teams across industries and geographies, such as the case of Salesforce. Enhancing sales teams to homogenize their sales methods across representatives and enhancing productivity of the sales force, through a methodical approach.

1. **Objective 1:** Identify the principal objectives of The Miller Heiman Methodology
2. **Objective 2:** Map the objectives to the capabilities of the Salesforce Platform
3. **Objective 3:** Program the logic and business requirements needed to manage complex sales into the Salesforce Platform.
4. **Objective 4:** Provide a product demonstration of the implemented methodology in a Salesforce "Simple Demo Org".

The project translates The Miller Heiman Methodology to the leading Customer Relationship Management (CRM) technology product, Salesforce IDC, 2023. Translating the requirements and enhancements highlighted in the methodology to a Salesforce demo

environment. A Salesforce Demo Environment (SDO) is an instance of the Salesforce Platform hosted in the cloud. It can be personalized in order to create a compelling product demonstration.

This project will not cover the deployment phase of the solution nor the technical requirements for a successful implementation in a company or a sales team. It will focus on translating the main principals of a proven sales methodology to a successful and leading technology product used in most companies worldwide.

# Chapter 2

## The Miller Heiman Methodology

### 2.1 Basis of the Methodology

*The New Conceptual Selling*, by Robert B. Miller and Stephen E. Heiman (Hereinafter called "The Miller Heiman Methodology") is a book on sales methodology which has shaped the modern perception of strategic B2B sales (Carlson et al., 2008). The project is not intended to demonstrate the correctness or success of The Miller Heiman Methodology. On the other hand, it presents the capabilities of a CRM software such as Salesforce to adapt and implement a proven sales methodology.

Throughout the project, most sales concepts and methods which are highlighted as successful or of a high standard are extracted from The Miller Heiman Methodology.

A first introduction of the Miller Heiman Methodology is understanding their view on traditional sales and myths that have traditionally been considered correct. Their methodology is aimed at moving away from the traditionally approved knowledge around the field of sales, which are denoted as "myths" in The Miller Heiman Methodology. Addi-

tionally, overcoming challenges of modern complex selling in a way that customers will naturally feel more accompanied and understood throughout the process and therefore increase the likelihood of winning a sale.

## 2.2 Myths of Traditional Selling

**Myth 1: Push the Slinky Sphinx.** The idea behind pushing a product that has higher profit margin or that is strategic to a company is antiquated. A customer should not be buying what a salesperson wants them to buy, but something that fulfills a customer's needs and desires. The idea that this "product push" is good selling is the oldest, the most durable and probably the most harmful of selling myths. It goes hand in hand with the old idea that selling has to be a numbers game: that is, the more money pocketed each sale, the better off you will be. This can lead to unhappy customers, and short, unhealthy relationships which in the long-run, will only ruin a business and a sales team (Miller and Heiman, 1999, p. 20).

**Myth 2: Use anything that works.** The major concern of a salesperson should be to satisfy the customers' needs. Therefore, if there is any other major objective above this, the salesperson will seek the opportunity to use any strategy that works, whether that may be lying, intimidating or embarrassing a customer. Furthermore, even if the salesperson is honest, with the "use anything that works" mentality, salespeople walk into any new sales call with nothing but a bag of selling "techniques" that they will use blindly until any one of them works. With this trial-and-error approach, the salesperson starts every new sales call at square one. So honest, or dishonest, they are always a novice (Miller and Heiman, 1999, p. 20).

**Myth 3: Keep things on track.** In the pseudo-methodology called "track selling", the salesperson memorizes a script and delivers it orally, verbatim, to every customer they meet. While a plan and automation of repetitive necessary tasks is needed, no complex sale is the same, and the salesperson should lead the customer through a journey toward the root of their problem and thereafter the desired solution. Traditionally, salespeople assumed the client to be stupid, and that they needed to be told what they wanted. Nevertheless, they should not be told but be guided to understanding what they want, and it is the salesperson job to do that (Miller and Heiman, 1999, p. 25).

**Myth 4: Do more legwork.** In sales, there is always one word that is correlated with success, and that word is: *more*. Salespeople that subscribe to the traditional wisdom will not try to analyze if they are doing something wrong. They continue to assume their techniques are fine, and the problem must be that they are not working hard enough. Jumping at every opportunity and not analyzing a prospect, will reduce efficiency and productivity and therefore not necessarily lead to a proportionate increase in sales. Doing more legwork is not always the best solution (Miller and Heiman, 1999, p. 25).

## **2.3 The Customer's Decision-Making Process**

The driving force behind every sale is the individual customer's decision-making process (Miller and Heiman, 1999, p. 30). The Miller Heiman Methodology describes a formulaic pattern for most people that describe the reasoning behind the customers' decision-making process. Focusing on the customers' decision-making process will allow to understand the fit between the seller and the buyer, identifying opportunities

that are a fit, and others that are not. This allows to focus the commercial resources into opportunities which have a higher chance of success (Miller and Heiman, 1999, p. 32).

The main principles developed within the methodology are the following:

1. Buying is a special case of decision-making.
2. Every time a customer makes a buying decision, they do so in a series of predictable and logical steps.
3. The steps of the person's decision-making process take place in an equally predictable and logical sequence that can be identified and tracked by the seller.
4. By following this sequence and helping the customer to follow it, one of two things can be discovered. Either (a) there is a solid fit between their needs and the solution that the seller can offer, which can lead to a quality sale; or (b) there is no such fit, and the seller should not be doing business with the prospect or client.
5. By ignoring or working against the customers' decision-making process, the seller ensures confusion, resentment and lost sales.

Following these steps is what makes the Miller Heiman Methodology a "customer-driven" not a "seller-driven" system (Miller and Heiman, 1999, p. 32).

The first three principals have a particular focus on understanding the customer decision-making process and how the customer makes buying decisions. The last two principles focus on filtering those opportunities which are not a good fit, which can lead to undesired circumstances, and lost resources.

### 2.3.1 Tactical Planning

To manage each sales call and understand the customers' decision-making process, the seller needs to do tactical planning. This requires consciously thinking through in advanced and writing down a Sales Call Plan to handle the three key phases of the sales call: Getting Information, Giving Information and Getting Commitment (Miller and Heiman, 1999, p. 35).

1. **Phase One - Getting Information:** Learning about the customers' business to effectively understand their situation. Finding out the customer's reasons for possibly being interested in doing business. This information is used to qualify opportunities, through a strong focus on important categories which lead to a successful sale.
2. **Phase Two - Giving Information:** Describing and demonstrating the product or service, but only in relationship to the needs of the individual customer. This also involves understanding the competition to gain a competitive advantage through the selected information that is given to the client. Aligning the sales call to one of the objectives of this project as mentioned in Section 1.2, "Analyze and use competitors' information to further understand the chances of success".
3. **Phase Three - Getting Commitment:** Resolving uncertainties that might prevent the potential customer from buying even if the fit between their needs and the seller's solution is a good one. This does not mean overcoming the customers' objections, but working with them so that the seller and buyer both gain commitment to buy and sell.

The three phase sales call described allows a seller to understand the client, their decision-making process, and overcome their competition in a systematic way (Miller and Heiman, 1999, p. 35).

### 2.3.2 How Customers Make Buying Decisions

The Miller Heiman Methodology does not assume the need of the buyer for any product or service, but instead encourages the search for a fit between what the customer may need and the solution the seller can offer. This is referred as The Joint Venture Selling, which starts by understanding how a customer makes buying decisions by following the customers' natural thought process (Miller and Heiman, 1999, p. 35). This process is composed of three types of thinking that people put into operation every time they grapple with a decision. The three types of thinking, according to J.P. Guilford in his book *The Nature of Human Intelligence* are: Cognition thinking, Divergent thinking and Convergent thinking (Guilford, 1967).

1. **Cognition Thinking:** Allows the decision-maker to understand the situation he or she is facing. Cognition is the process by which raw information is given sense and structure; it is what provides the client with a mental picture of what they are facing. In a successful sale, both the potential buyer and the seller have good, complete cognition, and they are able to build on that cognition to generate real matches and real solutions (Miller and Heiman, 1999, p. 36).
2. **Divergent Thinking:** Helps the person to explore options and solutions. It is necessarily the second step because it is not possible to accomplish diverge thinking without having gone through a cognitive process. The central aspect of



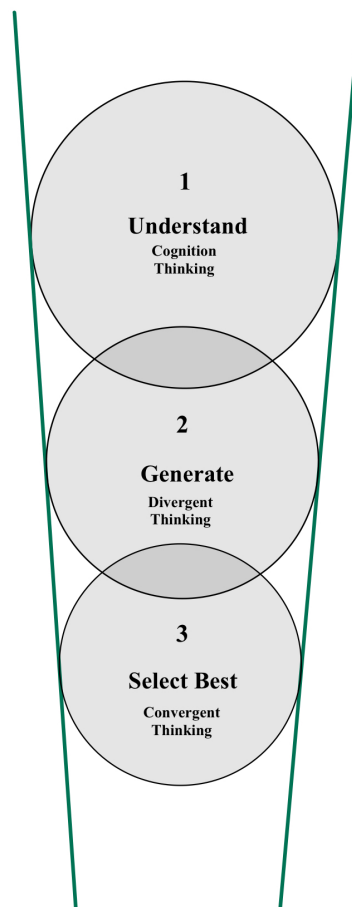


Figure 2.1: Three types of thinking - Own elaboration based on *The New Conceptual Selling* (Miller and Heiman, 1999).

divergent thinking is to explore possibilities, not exclude them. Therefore, this is as important in an interaction with a potential customer as it is in any brainstorming session (Miller and Heiman, 1999, p. 36).

3. **Convergent Thinking:** Enables the person to select the best solution. Once the decision-maker has had the opportunity to consider all available options, the final step is to select the best one for them. This is the point when the client makes the

decision, but it is only the final step in the entire decision process. Miller Heiman explain the paradox behind Convergent thinking in a customer's decision-making process. The seller might think that the decision is the hardest part of the sales cycle, but truly, when enough time has been put into the entire process, the decision making or Convergent thinking aspect of the process becomes a "quick and almost automatic operation" (Miller and Heiman, 1999, p. 36).

## **2.4 The Win-Win Sale**

Underlying everything in the Miller Heiman Methodology is a commitment to a Win-Win selling philosophy (Miller and Heiman, 1999, p. 55). In Win-Win selling, both the buyer and seller finish a sale with a clear understanding that their respective best interests have been served, thus both parties have a feeling of winning. In the modern sales world, to ensure that the seller's success will last from customer to customer and from sales call to sales call, obtaining the individual order is not enough, as stated in the Miller Heiman Methodology, a seller also needs:

- Satisfied customers
- Long-term business relationships
- Solid, repeat business with "regular" customers
- Enthusiastic referrals to new prospects

The reason is implicit in the nature of selling itself. In selling, at least two parties have to come to an agreement. Therefore, every sale involves mutual dependence and

the aforementioned factors are necessary for a reliable selling method in the long term (Miller and Heiman, 1999, p. 55).

To further develop on the idea of a Win-Win sale, the Win-Win Matrix is developed.

### 2.4.1 The Win-Win Matrix

The first step in the Win-Win philosophy is to recognize that the Win-Win outcome is only one of four possible outcomes of any sale. In this scenario, a sale is that which has been successfully closed, resulting in an order from the customer. From this sale, four possible outcomes are possible:

- **Win-Win:** Both parties are satisfied with the business relationship
- **Win-Lose:** The seller is satisfied about the sale, but the customer feels that they have gotten the short end of the stick.
- **Lose-Win:** The customer is satisfied but the seller feels like they have gotten the short end.
- **Lose-Lose:** The deal has been closed, but both parties are not satisfied with the outcome and the chance for a repetitive, successful relationship is very unlikely.

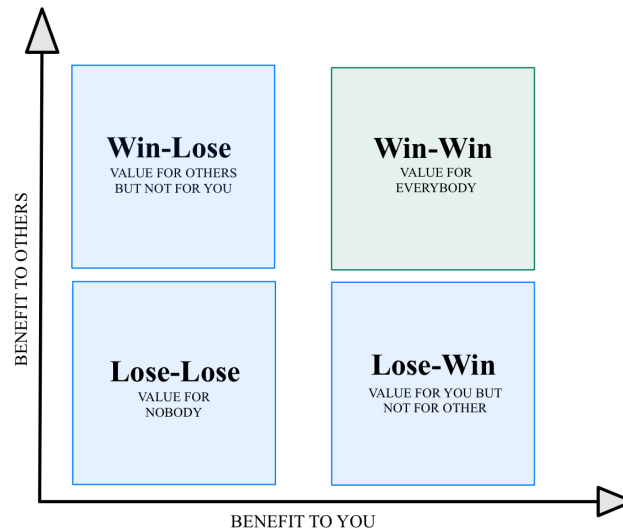


Figure 2.2: Win-Win Matrix - Own elaboration based on The New Conceptual Selling (Miller and Heiman, 1999).

### 2.4.2 Challenges to Staying Win-Win

There are four common problems that make staying within the Win-Win quadrant a challenge. Therefore, implementing a process through which the seller identify them before investing resources into a sale is necessary (Miller and Heiman, 1999, p. 57).

#### **Problem One: No fit between the client and the product or service**

It is not possible to stay in the Win-Win quadrant if the product or service does not fit the client (Miller and Heiman, 1999, p. 57). Attempting at convincing the client will lead to any of the other three outcomes, and will lead to a poor allocation of resources from a commercial team in the long-run due to lack of repetitive sales and the unsatisfied customer.

**Problem Two: Pressure to meet quota**

The objective of a sales representative is to meet or even surpass their quota, in order to increase visibility within a company and gain a larger bonus. Nevertheless, this will not encourage Win-Win situations and can make a company under perform, or lose potential clients. Measuring varying Key Performance Indicators (KPIs) that motivate the commercial teams to focus on Win-Win sales, will make both, the client and the seller more satisfied (Miller and Heiman, 1999, p. 56).

**Problem Three: Undercutting by the competition**

This problem leads to Lose-Win situations, where the seller takes deals which are not recommended, only to beat the competition. Understanding the competition and their stance on a sale is of utmost importance to not end up in a Lose-Win situation, which is not ideal even if the sale is won. Therefore, this idea goes against the "volume first" philosophy, where businesses tend to focus only on volume, rather than the quality of a sale that can lead to repetitive and successful business in the long-run. According to The Miller Heiman Methodology, the "volume first" philosophy hinders businesses long term (Miller and Heiman, 1999, p. 56).

**Problem Four: The customer does not allow for Win-Win situations**

The Miller Heiman Methodology explains that if a customer makes a situation anything but a Win-Win, and does not allow for negotiations for the sale to be successful for the seller, it is better to not do business with that particular client (Miller and Heiman, 1999, p. 57). Therefore, the qualification of opportunities, as stated in the main objectives of the project in Section 1.2, is important to understand if it is worth spending resources

on a complex opportunity.

## **2.5 Main Objectives: The Miller Heiman Methodology**

The main objectives of The Miller Heiman Methodology are:

1. Qualify complex sales opportunities based on distinct and important categories.
2. Allow sales teams to find and influence decision-makers.
3. Homogenize the efforts of individual sales reps to follow guidelines and increase their productivity.
4. Generate account plans to better understand the opportunities within an account.
5. Analyze and use competitors' information to further understand the chances of success.
6. Integrate tutorials to reduce the learning curve of new sales representatives.

Most objectives are related to making the customer the main focus of a sale and empowering the seller to work faster and be more productive. Understanding the customers' needs will empower a seller to understand if a sale should end in a Win-Win situation or not, as seen in Section 2.4.

The first objective is the main purpose of this development and The Miller Heiman Methodology, to understand the nature of an opportunity and the respective client in order to better manage resources. Traditionally, commercial teams attempt a sale no matter the circumstances, any sale would be regarded as a good sale, and the only

## *2.5. Main Objectives: The Miller Heiman Methodology*

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objective of a sales representative was to meet the quota in the short-term, as seen in Section 2.2.

Within the qualification of complex opportunities, other objectives are taken into consideration such as objectives number two, four and five.

On one hand, the qualification of opportunities is based on characteristics such as the structure of the decision-making chain and the availability of contact with higher ranking individuals within this chain. On the other hand, as seen in Section 2.3.1, understanding the competition in a complex opportunity enables commercial teams to understand their position and whether they are at a competitive advantage or disadvantage. Therefore, allowing a seller to allocate more resources to an opportunity with a notable competitive advantage over the competition than those at a disadvantage.

Additionally, objective four is closely related to a customer-centric sales approach. Generating account plans allows commercial teams to understand the level of need of a client, their likeliness to spend, their available resources, previous sales and opportunities for repetitive sales. These are characteristics which are developed and taken into account within the qualification of opportunities, which are explored in the account plan of a large account.

Additionally, the objectives three and six are complimentary to the objectives derived from The Miller Heiman Methodology. They allow the implementation to be more successful in a business context.

First of all, objective number three allows all sales representatives within a commercial team to apply The Miller Heiman Methodology and other methodologies to their sales strategies. Additionally, allowing managers and commercial leaders to impose actions when interacting with potential opportunities based on the opportunities' sta-

tus. Therefore, allowing sales representatives to follow standard procedures and have a standard and accepted communication with the client.

Secondly, the integration of onboarding in-app guidance enables incoming sales representatives to learn the technology faster and more efficiently. Therefore, using less resources and allowing the seller to start selling earlier, lowering the barriers of the opposition to change, and helping commercial teams through change management of implementing new technologies.

Technology and digitalization has shaped the field of sales, and it is of utmost importance to utilize the available tools successfully to stand out. Within this project, it is demonstrated how Salesforce can adapt sales methodologies such as The Miller Heiman Methodology.



# Chapter 3

## Digitalization in Sales & Salesforce

### 3.1 Digitalization of Sales Organizations

The way buyers and sellers communicate has changed dramatically. With this, customer relationship management has been so pervasive that it has evolved both as a business philosophy and as a technology (Hunter and Perreault, 2007). Sales-based CRM technology is designed to help sales teams meet their objectives by managing customer relationships. Nevertheless, the adoption of digital technologies in the modern business world stays fast-moving, and managers underutilize the huge potentials entailed by digitalization Goldmann and Knörzer, 2023.

Additionally, the majority of business-to-business companies are working on their digital transformation in sales. Despite the extensive transformation efforts, the expected productivity gains are often missing in most companies (Wengler et al., 2021). However, some of the reasons for the missing productivity gains is are caused by a limited knowledge about the reasons for success from digital transformation and a lack of

understanding of digital transformation as an evolving process. (Wengler et al., 2021).

The field of sales is evolving around technology. Sales executives are seeking to maximize the ROI of technology and are constantly evolving their infrastructure around their sales teams. At the forefront of this growth is Salesforce, the number one CRM application company based on market share, with a 22.1% of the market, followed by Microsoft with a 5.7% (IDC, 2023).

## **3.2 The Salesforce Platform**

Salesforce is a cloud-based customer relationship management (CRM) software. The solution is a platform which can be customized to the specific needs of the user with low-code solutions. Helping companies find more prospects, manage opportunities and contacts, enhance their customer service, have out-of-the-box business-to-business (B2B) and business-to-customer (B2C) marketing solutions and more. The solutions are divided into clouds/products, which are separated based on their intended out-of-the-box use.

Salesforce is used in this project over other CRM softwares for two reasons: It is the most widely used CRM software in the world (IDC, 2023) and it allows for custom product demonstrations in specialized *demo instances*. This demo instances are used to demonstrate the capabilities of the software without the need of a full deployment at scale.

Many of the main uses of each of the solutions provided by Salesforce are the following.

| <b>Solutions</b>    | <b>Brief Description</b>                                          |
|---------------------|-------------------------------------------------------------------|
| Sales Cloud         | Platform for sales reps. and execs. to manage sales and forecasts |
| Service Cloud       | Platform for customer service agents to manage customer problems  |
| Marketing Cloud     | Platform for B2C marketing, customer journeys and segmentation    |
| Einstein 1 Platform | End-to-End solution for embedded AI in the Salesforce Platform    |
| CRM Analytics       | Data visualization tool within the Sales & Service Cloud platform |
| Other               | Mulesoft, Tableau, Slack, Heroku and more                         |

Table 3.1: Salesforce core solutions

To implement The Miller Heiman Methodology, Sales Cloud will be used. Sales Cloud is the core CRM application within the Salesforce platform, and it is optimal for opportunity evaluation and management, which is pivotal to the development of the Miller Heiman Methodology. Additionally, Service Cloud and The Einstein 1 Platform are used to demonstrate the capabilities of Salesforce and create a rounded solution around the sales methodology. These solutions are explained in the following sections.

### **3.2.1 Sales Cloud**

Salesforce Sales Cloud represents a multichannel and multifunctional customer relationship management (CRM) solution, intended to address sales forces' requirements in various industries. It offers a range of functions and capabilities, designed to help businesses increase the efficiency of their sales, minimize time spent on paperwork and maximize value for customers. Morphologically, Sales Cloud helps efficient leads management by enabling organizations to identify, follow, and convert leads through the sales funnel. It provides specific fields for capturing leads, automatic lead routing and

lead grading features to enhance the salesperson's way of filtering potential hot leads for conversion.

In addition, Sales Cloud has effective opportunity management features that allow organizations to follow and control deals, predict revenues, and organize sales trajectories successfully. Opportunities can be easily viewed and edited by the sales reps hence there is accountability throughout the sales management process. Moreover, Sales Cloud consolidates the accounts and contacts providing the sales teams with one more way to obtain detailed information about their customers. The nature of interaction in Sales Cloud involves storing and archiving account and contact info, their preferences, and past communication associated with each of them, all of which helps in establishing and maintaining a healthy rapport.

Moreover, Sales Cloud also enables the members of different sales teams to improve their cooperation by using Chatter – the internal communication tool in Salesforce CRM and notifications within the application. Sales representatives can communicate ideas, strategies, discussing deals; such use facilitates cooperation between employees and knowledge exchange. It also comes with rich business intelligence and analytics tools that help organizations to monitor, assess, and analyze sales data in an organization. Reports and dashboards as built-in options for users provide a customizable way to view important data, track performance against targets, and discover relevant data insights for furthering business objectives.

Once more, Sales Cloud is available as a cloud-based solution, and users of this information system obtain updates on a regular basis to utilize new features and developments. Sales Cloud updated constantly, with a rich partner and development community working closely to deliver new features and to land the CRM technology cutting edge.

In conclusion, Salesforce Sales Cloud can be considered as being a CRM solution that caters to all needs of an organization and helps them to enhance sales, generate revenues as well as provide customers with the most exceptional experience.

EXPLICAR SI NO SE VA A USAR UN PRODUCTO Y POR QUE. Y SI SE USAR TAMBIEN DECIRLO.

### **3.2.2 Service Cloud**

Salesforce Service Cloud provides a comprehensive solution that aims at helping business improve its customer service. It acts as an all in one solution tool that is full of features that help in managing support functions which in turn helps in ensuring customers are happy and helps support organizational goals.

At the heart of the Service Cloud is the idea of customer self-service and effective management of the requests that arrive in the company's electronic inbox. Through integration of all customer contact points in a single interface for emails, phone and social networking sites, as well as chats, the Service cloud makes it possible for support teams to easily tend to customers' concerns and respond to them promptly.

Furthermore, it allows the intelligent routing and assignment of cases where an inquiry is passed over to the correct agent that has the ability to solve it without hassle. This helps address customers' complaints and inquiries faster and enables a timely conclusion of complaint or issue handling thereby making service delivery more efficient and effective.

Moreover, Service Cloud helps organizations be more proactive in how they support their customers or users through tools like knowledge and self served content. By offering customers the access to the various forms of knowledge base, FAQ, and community

forums, Service Cloud allows customers to search for answers to their questions on their own and not necessarily to get an agent's help; thus, increasing customer self-sufficiency.

Also, it can be said that Service Cloud has effective tools for analytics and reporting, with which organizations will be able to get the necessary knowledge about the performance of the service sphere and the interaction with clients. The assessment of KPIs, observation of service levels, as well as the identification of patterns help organizations to more effectively manage their operations using Service Cloud by making evidence-based decisions and refining services.

The advantages of Service Cloud are multifold, elaborating the ways in which service legislations can be facilitated, the overall satisfaction rate can be elevated, the resolution time can be minimized, and productivity standards of the agents can be maximized. In this case, organizations benefit from Service Cloud by experiencing change and improved customer support service organization as well as the overall revolution of the support service delivery from customers' perspective.

In conclusion, the Service Cloud is a cornerstone, as far as organizations that desire to elevate their customer service Arm is concerned. Nevertheless, due to the scope of the Miller Heiman Methodology not reaching customer service, Service Cloud is not used within the project.

### **3.2.3 The Einstein 1 Platform**

Salesforce AI is a fundamental component of Salesforce, and the Einstein Platform is an imposing EXPLICAR CI/CD suite of AI elements within Salesforce. It enforces a synergy of machine learning, natural language analysis, predictive modelling and data analytics for the purpose of optimizing different areas of business. The Einstein Platform

builds on data within the Salesforce CRM, enabling businesses to harness value, drive efficiencies, and offer solutions on a substantial scale.

Essentially, the Einstein Platform includes predictive lead scoring as a main feature, in order for the sales representatives to prioritize high quality leads according to historical data, behaviors and interactions. Therefore, by identifying the potential for sales and quantifying the patterns of communication that had occurred in the past, Einstein assists the sales representatives with directing their approaches to prospects that are most likely to yield a positive result, which in turn optimizes sales productivity and potential.

Additionally, the Customer Engagement Quadrant in the Einstein Platform helps to present unique recommendations with the specific content of each user. By the evaluation of customer data regarding their history of purchases, URLs visited, and other particulars, thus Einstein offers relevant products to be purchased, attractive offers, and prompt marketing messages.

Additionally, the Einstein Platform enables organizations to prove transactional enablement and business process automation through application of Artificial Intelligence to workflows and smart automation. By evaluating past data and trends, Einstein can suggest ways of automation of lead routing, email replies, and even the task that need to be assigned, to help organizations improve operational performance.

Moreover, the Einstein Platform caters for analytical features and data analyses in order for organizations to have deeper understanding regarding analytic results and forecasts of the future outcomes of various activities. Several aspects of Einstein include interactive dashboards and Reports, Forecasting Analysis and Prediction Models through the computation of key performance indicators enables users to understand past organizational performance, gain insights into current trends and foresee future trends,

opportunities, and risks.

The Salesforce Einstein Platform has many advantages such as; Sales and Marketing which enables efficiency in business and marketing engagements to customers, Operational efficiency which leads to an efficient business operation, Data that can be analyzed and lead to rationalized decision making. In this context, it is possible to conclude that the deep integration of AI and machine learning in Salesforce CRM strategies ensures greater visibility of companies in the market, as well as increasing competitiveness through the effective use of data.

Therefore, the Einstein Platform is a revolutionary tool in the Salesforce world with the potential a formulate a new generation of companies that will determine decision making through artificial intelligence. In today's and future business environments, more and more companies undergo Digital Transformation processes – the Einstein Platform adds up as the key enabler on the way to the successful Business development.

Finally, the Einstein Platform is used throughout the project as an additional capability to the proposed solution. However, it is not highlighted in the main functionalities mapped to The Miller Heiman Methodology's objectives.

### **3.2.4 CRM Analytics**

CRM Analytics can be defined as a comprehensive set of solutions that help the organisation harness the value of customer related data that would in turn assist in creating high business value insights. It includes a broad perspective of features and functions designed for improving the ways customers interact with a business, helping in its sales and marketing strategies, and generally achieving better results in business.

In more detail, CRM Analytics in Salesforce is the ability of an organization to use



diverse outcomes of the customer base analysis based on diverse factors. Salesforce CRM Analytics is a useful tool that enables individuals to gather and analyze data from multiple sources such as CRM systems, marketing platforms, and customer interactions along with other features that provide key information pertaining to customer behaviors, choices, and patterns.

The major highlight of CRM Analytics in Salesforce is the feature that allows for building dashboards and reports that enable users to visually track and monitor numerous metrics and Key Performance Indicators in real-time. These dashboards give an overall picture of sales, marketing, and customer satisfaction, whereby organizations can have a glimpse of the strong side and challenges.

Moreover, CRM Analytics in salesforce can also be linked with other salesforce products and other applications with which a company might be working and in this way, it offers a single platform solution for all the analytics requirements for a company. This integration makes sure that organizations are able to obtain adequate and simple-to-use data for their institutions in varied fields for successful operations.

In conclusion, CRM Analytics in Salesforce offers organizations a powerful toolkit for leveraging customer data to drive business success. By providing actionable insights, predictive analytics, and seamless integration, Salesforce CRM Analytics empowers organizations to optimize their sales and marketing efforts, enhance customer engagement, and stay ahead of the competition in today's fast-paced business environment. CRM Analytics is used within the solution for the visualization of Account information such as stock evolution. Additionally, it is used to have a view the state of all opportunities at once, to enhance the productivity of sales representatives and directors.



# **Chapter 4**

## **The Miller Heiman Methodology in Salesforce**

### **4.1 Requirements**

The implementation of The Miller Heiman Methodology will attempt at covering all the aforementioned objectives in Section 1.2 and will use other capabilities of the Salesforce platform to create a comprehensive and complete product demonstration. The core of the solution is designed within Sales Cloud, such as the qualification of opportunities and the generation of account plans. Additionally, other capabilities such as Client Portals within Service Cloud, Prompt Builder within the Einstein 1 Platform and Data Visualization in CRM Analytics will be demonstrated.

## 4.2 Development within Salesforce

Salesforce is a platform on top of which most CRM related business applications can be built. The main products, Sales and Service cloud and all their functionalities are based on the Salesforce Data Model Objects (DMO) (Salesforce, 2022).

The Salesforce DMO is the foundation of any Salesforce application, and can be modified to meet the needs of the business units. New entities can be added and defined within the Salesforce platform, with custom relationships and many layers of abstraction can be made until the final desired product is reached. Understanding the DMO and their relationships is essential for any successful development within Salesforce.

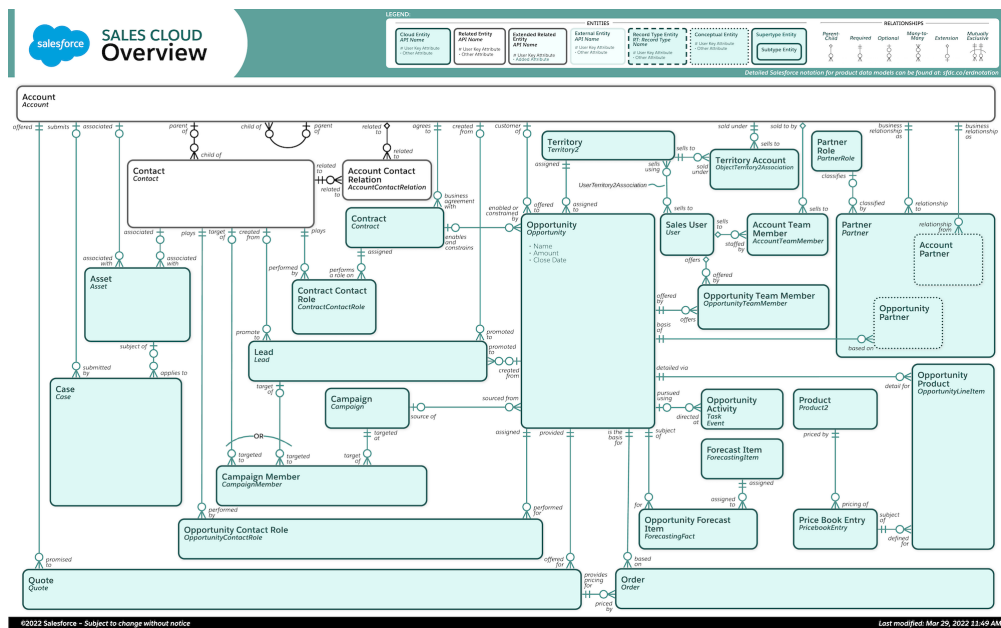


Figure 4.1: Sales Cloud Entity Relationship Diagram (EDR)

All objects within the DMO are names Standard Objects, any new object that is created and added to the DMO is a Custom Object, which are more flexible, but require

more configuration such as defining permission sets, creating relationships to existing entities, and customizing all the fields to adapt to the desired use case.

The following table introduces the most commonly used Standard Objects within the Sales Cloud DMO.

| <b>Standard Object</b> | <b>Brief Description</b>                                                                                                                        |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Account                | Represents an individual account, which is an organization or person involved with the business (such as customers, competitors, and partners). |
| Contact                | Represents a contact, which is a person associated with an Account.                                                                             |
| Opportunity            | Represents an opportunity, which is a sale or pending deal.                                                                                     |
| Lead                   | Represents a prospect or lead.                                                                                                                  |
| Case                   | Represents a case, which is a customer issue or problem.                                                                                        |
| Campaign               | Represents and tracks a marketing campaign, such as a direct mail promotion, webinar, or trade show.                                            |
| Quote                  | Represents a quote, which is a record showing proposed prices for products and services.                                                        |
| Order                  | Represents an order associated with a contract or an account.                                                                                   |
| Asset                  | Represents an item of commercial value, such as a product sold by your company or a competitor, that a customer has purchased.                  |
| Contract               | Represents a contract (a business agreement) associated with an Account.                                                                        |

Table 4.1: Salesforce Standard Objects

To further customize objects, Salesforce has developed their own strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on Salesforce servers in conjunction with calls to the API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects (Salesforce, 2006).

### **4.3 Salesforce Functionalities**

The scope of this project is to create a working instance of the designed application to qualify complex opportunities and enhance complex sales, adapting the Salesforce Platform to the Miller Heiman Sales Methodology. To accomplish this, a Salesforce Demo Instance has been used in order to demonstrate the capabilities of the Salesforce Platform and achieve Miller Heiman Methodology's objectives. Each objective is mapped to the technology within Salesforce, allowing for a complete solution that accomplishes each objective.

#### **Objective 1: Qualification of Opportunities**

The qualification of opportunities is the most important objective of The Miller Heiman Methodology, as it covers various aspects covered in Section 3. To successfully qualify opportunities, the approach that has been used is to create an entity called "Evaluation". This entity holds the categorical fields that are relevant to the qualification of an opportunity and can be filled in during the sales cycle in order to obtain a opportunity score

which allows the seller to have a better understanding of the opportunity.

The Evaluation entity has a 'one to many' relationship with the Opportunity entity. This way, it is ensured that each evaluation has one opportunity related to it, while one opportunity can have as many as needed. This could be the case if there are various players within the seller, and multiple evaluations have to be made.

The evaluation(s) of opportunities serve the purpose of qualifying opportunities in ranking of fit with the seller, which can be used by managers and sales directors to rank and prioritize opportunities, while sales representatives can prioritize resources on those opportunities that have a better fit, therefore, a higher chance of ending in a Win-Win situation.

Additionally, the opportunity score should be used, as explained in The Miller Heiman Methodology, to discard opportunities which do not have good fit, or those which the competition may have a competitive advantage, to avoid ending up in any other situation that is not a Win-Win.

## **Objective 2: Discover and influence decision-makers**

It is of critical importance within complex opportunities to identify the main decision-makers within the buyer (Miller and Heiman, 1999). The piece of technology used within Salesforce is relationship maps. A relationship map can be custom made in JavaScript by utilizing the customer information available within the CRM. Nevertheless, a more common approach is using an app that offers out of the box solutions. In the case of this project, the Altify Relationship Map app from the Salesforce App Exchange is used.



### **Objective 3: Homogenize the sales process**

Sales teams are commonly formed by more than one sales representative, and all should follow best practices to accomplish a correct qualification of opportunities and manage the sales cycle according to the appropriate standards. Homogenizing the sales process throughout a team is crucial. In Salesforce, this is accomplished with Account Engagement which is comprised of Cadences and Work Queues.

In Cadences, managers and sales directors define the possible paths in which opportunities can move based on their state and previous outcomes. An example may be, picking up or not picking up the phone to the previous call made by the sales representative. Based on the outcome of the decision nodes, opportunities are assigned to their most appropriate step, which is directly mapped with actions that need to be made by the responsible seller. The seller is then able to further qualify an opportunity, make repetitive calls or let an opportunity go, all depending on the Cadence created by the managers and sales directors, allowing for more control over opportunities.

On the other hand, Work Queues is what the sales representative uses to carry out the specified actions in the cadence through an automatized process. Opportunities in each step are prioritized based on their score, this could be the qualification score for the opportunity, or a score given by AI based on every possible characteristic and the success rate of opportunities with similar characteristics. The Work Queues allow sales representatives to focus more of their time on calling prospects and clients in a systematic process.

**Objective 4: Analyze competitor information**

Understanding the competitors in a complex sale will determine not only what products and services the seller is up against, but also whether there is a clear chance of success, that will enable a Win-Win situation.

A custom package has been developed within Salesforce in order to manage the competitors and their products. This package is comprised of three custom objects which are: Competitor, Opportunity Competitor and Competitor Contact. Competitor and Opportunity Competitor are related to each other in a "many to many" fashion to allow for opportunities to have various competitors, and various competitors to be in many opportunities. Additionally, Opportunity Competitor is related to the Opportunity entity to allow for the match between opportunities and competitors. Finally, the Competitor Contact are the contacts within competitors.

**Objective 5: Automated onboarding tutorials**

Finally, Objective 6 is outside of the scope of The Miller Heiman Methodology, being a technology oriented objective rather than sales oriented. The purpose for this objective is to allow for a smaller learning curve of onboarding sales representatives into a team by integrating automated tutorials throughout the CRM. Therefore, allowing an autonomous learning experience which will then, enable sales representatives to start selling faster with a correct understanding of the CRM.

This is done through the In-App Guidance tool in Salesforce. Configuring click-through tutorials throughout the CRM which are only active for users' first time visiting certain pages in order to understand their functionality and how to use them.

## **4.4 The Solution**

The solution is presented in the form of a product demonstration, in the natural order in which the user would go over each one of the implemented functionalities.

The objective of the product demonstration is to show the complete cycle of a product demonstration, which includes the sales manager and sales representative point of view. Therefore, the product demonstration consists of two parts: The Manager Demonstration and The Sales Representative Demonstration. In both demonstrations, The Miller Heiman Methodology's objectives are explored and demonstrated, with other Salesforce functionalities also implemented to make a coherent story and exploration of the product.

### **4.4.1 The Manager - Demonstration**

First of all, the manager logs into the Salesforce Platform and is presented with a Home Screen in which various actions and widgets are available. The objective of the Home Screen is to have a global view of the results of the manager's team, but also quick access options to important menus such as the Leads and Opportunities menu, and even the tasks for the day.

To enhance the Home Screen experience, and increase the productivity of the manager, CRM Analytics is used to create a concise dashboard. In this dashboard, the manager can have a first glance into the current pipeline, revenue, opportunities and clients assigned to their team. This is done in CRM Analytics, by obtaining all the available information within Salesforce which is assigned to the manager's team.

There are two dashboards in the Home Screen.

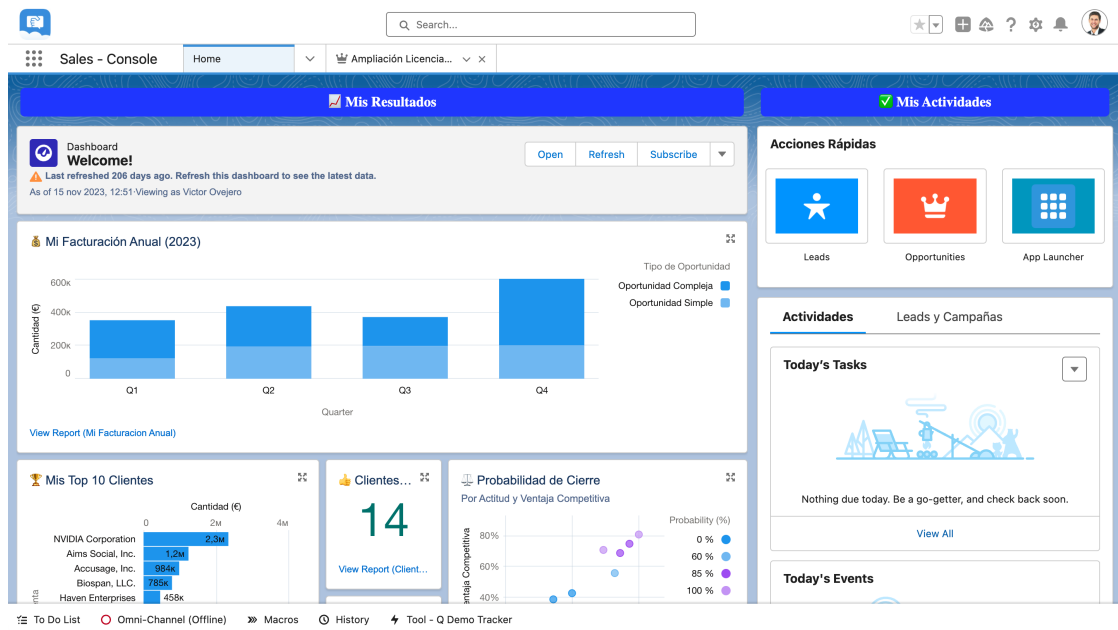


Figure 4.2: Manager's Home Screen

### First Home Screen Dashboard

The first dashboard centers around revenue, pipeline and opportunities. The information seen in the first dashboard, in order from top left to bottom right:

- Annual Revenue.
- Top 10 Clients by Revenue.
- Number of New Clients.
- Number of Lost Clients.
- Complex Sales by Chance of Closing.

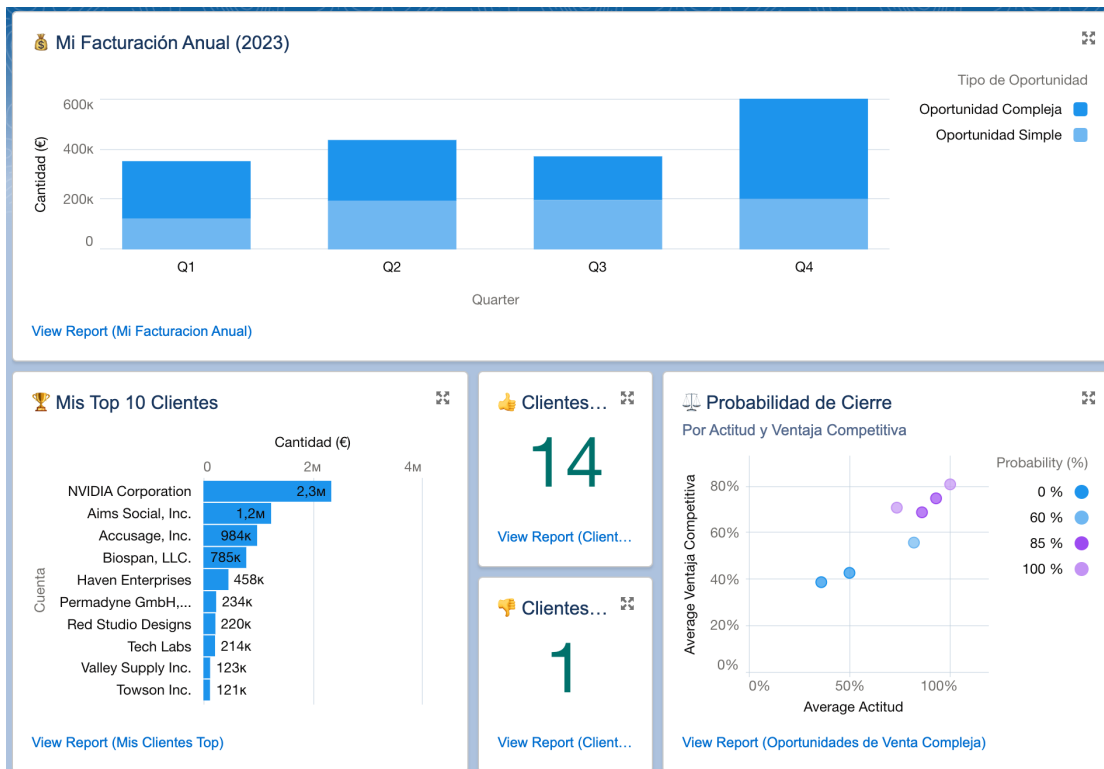


Figure 4.3: Manager's First Dashboard

## Second Home Screen Dashboard

The second dashboard is focused on competitor analysis. This dashboard is related to Objective five, from The Miller Heiman Methodology, allowing a manager to, at a glance, obtain information of biggest competitors and how much revenue is in opportunities with active competitors. The information seen in the first dashboard, in order from left to right is:

- Revenue in opportunities with competitors.
- Quantity per stage of competitor.
- Stage of the team's opportunities by stage of competitor.

- Monthly distribution of Opportunities by stage.

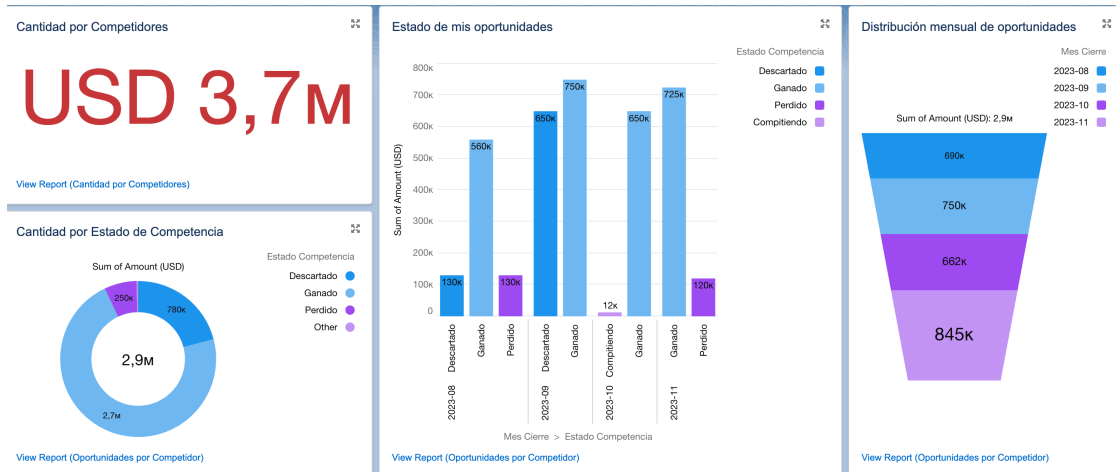


Figure 4.4: Manager’s Second Dashboard

### Report of Open Complex Opportunities

Finally, the Home Screen has a report of complex opportunities, being the focus of this project, and another report for the rest of the opportunities which are denoted as "simple opportunities".

This report allows for a screening of all opportunities which are open, therefore allowing the manager to prioritize work for the team.

From a managerial perspective, in the Home Screen, information needed about the team performance is available. However, the method of the team to manage sales is not being determined, with one of The Miller Heiman Objectives defined in the project being, "Homogenize the sales process". The next step shows the capabilities within the Salesforce platform for a manager can create Cadences for a team, to follow guidelines within complex sales, or any other sale and increase the success rate.

| <input type="checkbox"/> | Opportu... ↑  | Account N...  | Amount       | Ac...  | Ve... | Stage         | N... | Close Date    |   |
|--------------------------|---------------|---------------|--------------|--------|-------|---------------|------|---------------|---|
| <input type="checkbox"/> | Ampliación... | Accusage, ... | USD 12.45... |        |       | Evaluation    | 0    | 13/10/2023... | ▼ |
| <input type="checkbox"/> | Implement...  | NVIDIA Co...  | USD 560.0... | 86 %   | 69 %  | Closing       | 1    | 17/8/2023...  | ▼ |
| <input type="checkbox"/> | Licencias ... | Aims Socia... | USD 500.0... |        |       | Prospecting   | 0    | 31/5/2024...  | ▼ |
| <input type="checkbox"/> | Mejora a M... | NVIDIA Co...  | USD 250.0... | 93 %   | 75 %  | Closing       | 1    | 14/11/2023... | ▼ |
| <input type="checkbox"/> | Renovació...  | Aims Socia... | USD 50.00... |        |       | Evaluation    | 0    | 1/12/2023...  | ▼ |
| <input type="checkbox"/> | Renovació...  | Accusage, ... | USD 220.0... |        |       | Evaluation    | 0    | 29/2/2024...  | ▼ |
| <input type="checkbox"/> | Renovació...  | Upstyle Inc.  | USD 449.0... |        |       | Prospecting   | 0    | 30/12/202...  | ▼ |
| <input type="checkbox"/> | Renovació...  | Aims Socia... | USD 1.500... |        |       | Prospecting   | 0    | 31/5/2024...  | ▼ |
| <input type="checkbox"/> | Renovació...  | NVIDIA Co...  | USD 250.0... | 64 ... | 50 %  | Evaluation    | 2    | 31/3/2024...  | ▼ |
| <input type="checkbox"/> | 10000 Lice... | Salesforce    |              |        |       | Qualification | 0    | 31/10/2023... | ▼ |

Figure 4.5: Manager's Home Screen Report

## Sales Engagement - Cadences

pedirle a teresa credenciales de la org que usamos para poder hacer la parte de Sales Engagement

The second part of the product demonstration highlights the sales representative point of view. This product demonstration goes over every objective from The Miller Heiman Methodology as its key principles are on sales, and not on team management and commercial leadership. Nevertheless, a managerial point of view is used to understand the different aspects of the sales cycle, and the advantages of the Salesforce Platform for quick access to centralized data, as well as the capabilities of maintaining guidelines and best practices across entire sales teams.

## **4.4.2 The Sales Representative - Demonstration**

The second part of the Salesforce Platform demonstration is the sales representative point of view. This demonstration shows the capabilities of the sales representative that have been customized to enhance their sales capabilities through The Miller Heiman Methodology.

### **Complex Opportunity Evaluation**

The first, and most important objective of The Miller Heiman Methodology is the qualification of complex opportunities. Various evaluation matrices have been developed with important categories implicitly determined in the methodology. The evaluation is comprised of a total of three matrices, with focus on understanding the viability of opportunities based on various factors, and the strength of the competition. Finally, the result of the evaluation should allow the seller to determine how many resources should be allocated to the opportunity, or if the opportunity should be attempted at all.

The evaluation of opportunities is a numerical questionnaire with various categories that is meant to be filled at least once in every complex opportunity by the seller and any knowledgeable colleague that could help in unsure circumstances.

Additionally, the nature of qualifying opportunities may require more than one user to make inputs, within the solution, collaboration capabilities are introduced through "Red Flags". They are used to notify the relevant team member of help needed on certain categories. The available "Red Flags"

First of all, to determine the viability of the opportunity without yet involving any factors on competitive advantage or disadvantage, a first matrix has been developed and



named "Should we try?" (Miller and Heiman, 1999). The questionnaire is as follows.

| Factors                             | Negative | Neutral | Positive |
|-------------------------------------|----------|---------|----------|
| Geographical position               | -2       | 0       | 2        |
| Firm budget availability            | -3       | 0       | 3        |
| Estimated closing time              | -2       | 0       | 2        |
| Customer competence                 | -2       | 0       | 2        |
| Repetitive sales potential          | -3       | 0       | 3        |
| Strategic importance of the account | 0        | 2       | 4        |
| <b>TOTAL</b>                        |          |         |          |

Figure 4.6: "Should we try?" Questionnaire

The numerical possibilities vary between each category depending on their relative importance and positive or negative relevance. An example of this is the factor "Strategic importance of the reference". If there is no strategic importance, the opportunity does not become negatively evaluated, however, it does have a positive impact if there are strategic implications. The following is a list with brief explanation of the factors.

1. **Geographical position:** The geographical location of the account can determine the amount of times a seller can visit a client. Therefore, also potentially harming the relationship. An account five minutes away from the seller's office is prioritized over an account which is ten hours away by airplane.
2. **Firm budget availability:** The budget availability of a client is a key factor when determining how many resources should be allocated to an opportunity.

If the account does not have enough budget for the product or service, then the opportunity should be negatively impacted.

3. **Estimated closing time:** An opportunity with an estimated closing time further away, should not necessarily be prioritized over one that has an imminent closing date.
4. **Customer competence:** The competence of the customer should determine how likely the seller and the client are to reaching a mutual understanding of the services provided and the client's needs. If this is not achieved, the likelihood of a Win-Win situation is decreased.
5. **Repetitive sales potential:** Just like the "firm budget availability" factor, this is another key factor within the evaluation. The potential for repetitive sales will greatly increase the potential revenue from the opportunity in the long-run, and could lead to a strong relationship with a customer. This will allow a seller to surpass their quota many quarters, as well as gaining a trusted advisor and client.
6. **Strategic importance of the account:** This is a key factor with a positive bias. If an account is of strategic importance for the firm, it should be prioritized. On the other hand, if it does not have strategic importance, it should not interfere with the seller's allocation of resources to the opportunity.

The second aspect of the evaluation is the competitive advantage or disadvantage of the seller over an opportunity. There are another six factors in the second half of the evaluation. Nevertheless, this time the score is relative between the competition and the seller's firm, denoted by "Us". The final result is the difference between the two. The

second part of the evaluation is comprised of the questionnaires: "Can we compete?" and "Can we win?".

| Factors                                             | Us  |   |     | Competition |   |     |
|-----------------------------------------------------|-----|---|-----|-------------|---|-----|
|                                                     | Neg | N | Pos | Neg         | N | Pos |
| Suitability of our solution to the customer's needs | -4  | 0 | 4   | -4          | 0 | 4   |
| Quality of the past relationship with this customer | -3  | 0 | 3   | -3          | 0 | 3   |
| Cultural compatibility with the client              | -4  | 0 | 2   | -4          | 0 | 2   |
| <b>TOTAL</b>                                        |     |   |     |             |   |     |

Figure 4.7: "Can we compete?" Questionnaire

| Factors                                                              | Us  |   |     | Competition |   |     |
|----------------------------------------------------------------------|-----|---|-----|-------------|---|-----|
|                                                                      | Neg | N | Pos | Neg         | N | Pos |
| Quality and quantity of customer information                         | -3  | 0 | 3   | -3          | 0 | 3   |
| Knowledge of the influence structure of the decision-making process. | -3  | 0 | 3   | -3          | 0 | 3   |
| Knowledge of key people's benefit                                    | -4  | 0 | 4   | -4          | 0 | 4   |
| <b>TOTAL</b>                                                         |     |   |     |             |   |     |

Figure 4.8: "Can we win?" Questionnaire

As in the first part of the questionnaire, a brief description of the factors is expressed.

1. **Suitability of our solution to the customer's needs:** As expressed in Chapter 3,

the solution provided by the seller should fit with the customer needs.

2. **Quality of the past relationship with this customer:** The quality of past relationship can have an effect on future opportunities.
3. **Cultural compatibility with the client:** Cultural differences can make construct barriers between the seller and the client.
4. **Quality and quantity of customer information:** Information available about a customer allows a seller to gain an advantage and understand the fit between them.
5. **Knowledge of the influence structure of the decision-making process:** As determined in The Miller Heiman Methodology, a strong understanding of the influence structure of the decision-making process will lead to an increase in the success rate of opportunities.
6. **Knowledge of key people's benefit:** Finally, understanding how key people within the account benefit from an opportunity, can allow the seller to exploit these benefits to their advantage.

To initiate an evaluation process within the Salesforce platform, the first step is to enter the desired opportunity record. The name of the evaluation is added and two other inputs are mandatory: "Responsible for Viability" and "Responsible for Competitiveness". These fields require an input of another person within the team that will be responsible for helping the owner of the opportunity in evaluating the opportunity when a red flag is raised.

The stage of the opportunity is represented at the top, with all the relevant information such as amount, expected close date and opportunity owner. The first tab is called

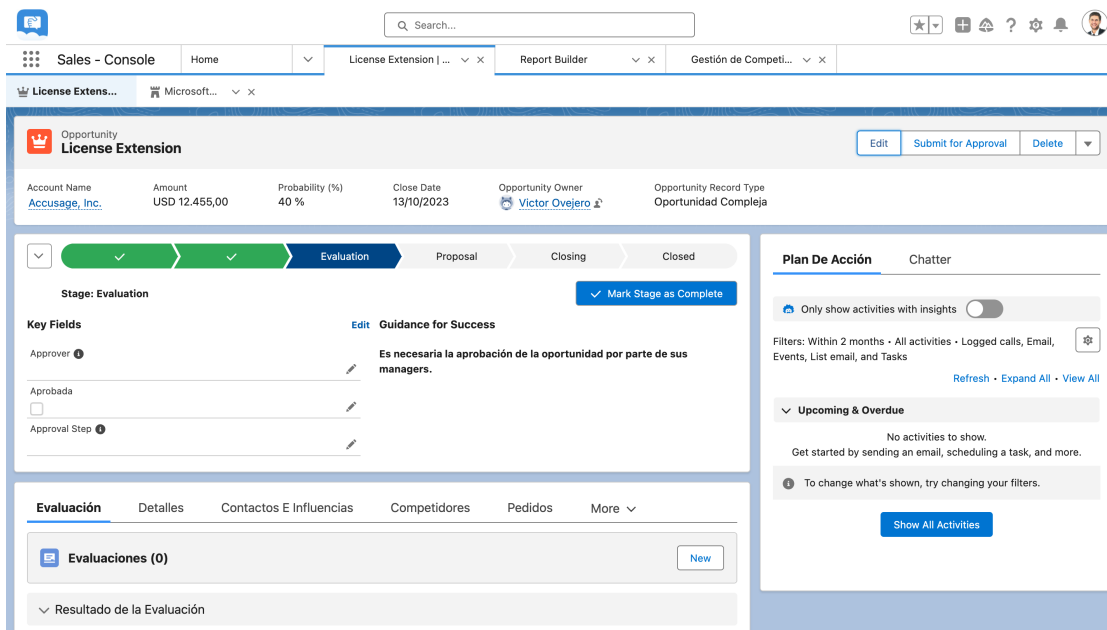


Figure 4.9: Opportunity Record

”Evaluation”, from there any ongoing evaluation can be accessed and the evaluation scores are summed up. At first, the opportunity does not have any ongoing evaluation.

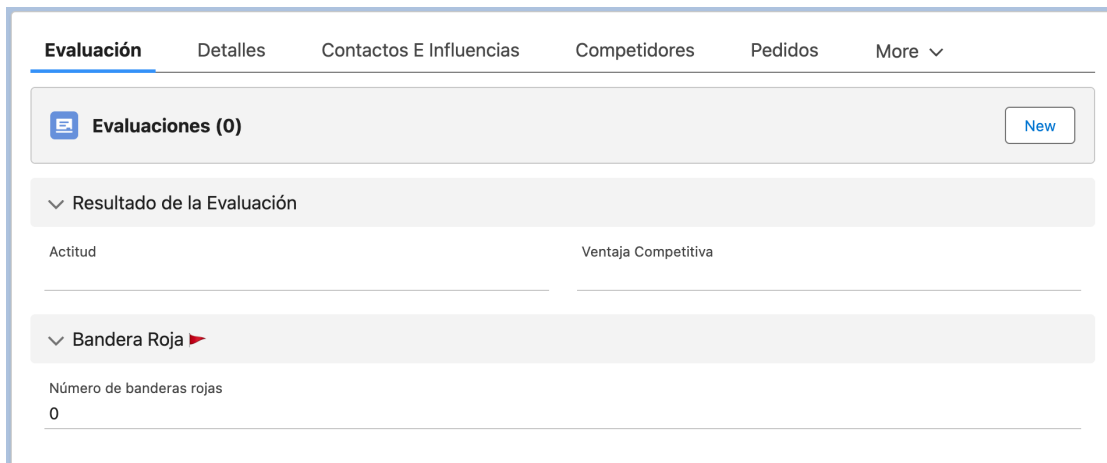


Figure 4.10: Opportunity Record - Evaluation

From the Evaluation object, the 'New' button can be clicked, to begin the qualification

of the opportunity. From there, the relevant questionnaires are accessible to the seller and the team around the opportunity. All scores are calculated automatically based on the numerical inputs given by the user.

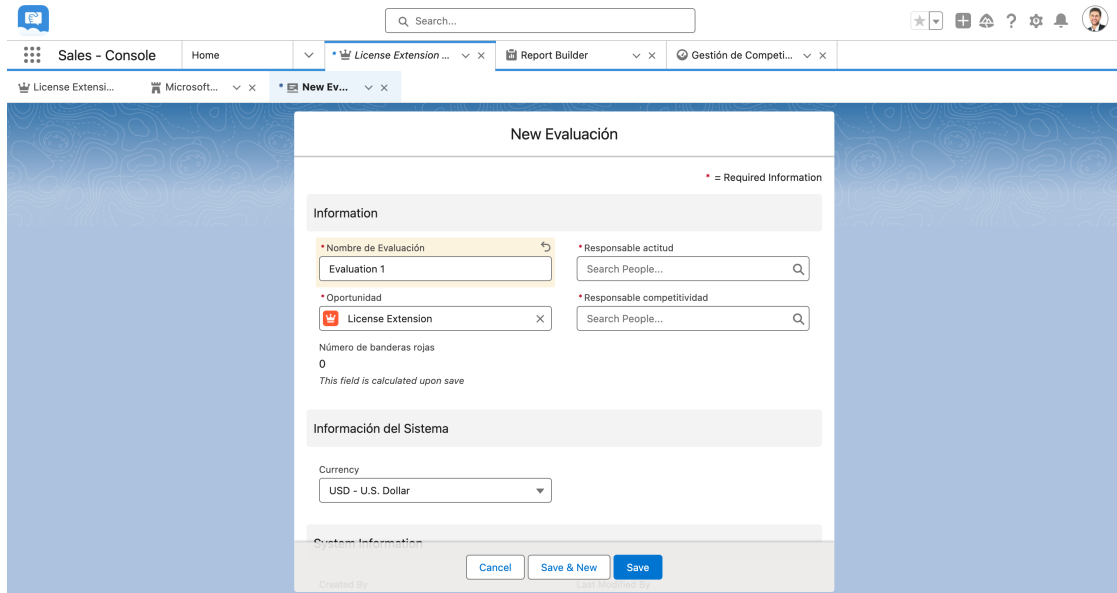


Figure 4.11: Create an Evaluation

Once the evaluation is created, the evaluation should be filled with numeric inputs until it is completed. This is a prerequisite for any complex opportunity before it is moved to more advanced stages.

### Discover and influence decision-makers

The second aspect of the solution is the management of contacts of the account, and understand their influence over the decision. The Salesforce Platform enables information to be used across entities due to the centralized DMO. Within every opportunity, the relevant decision-makers can be added from the database of contacts in the account.

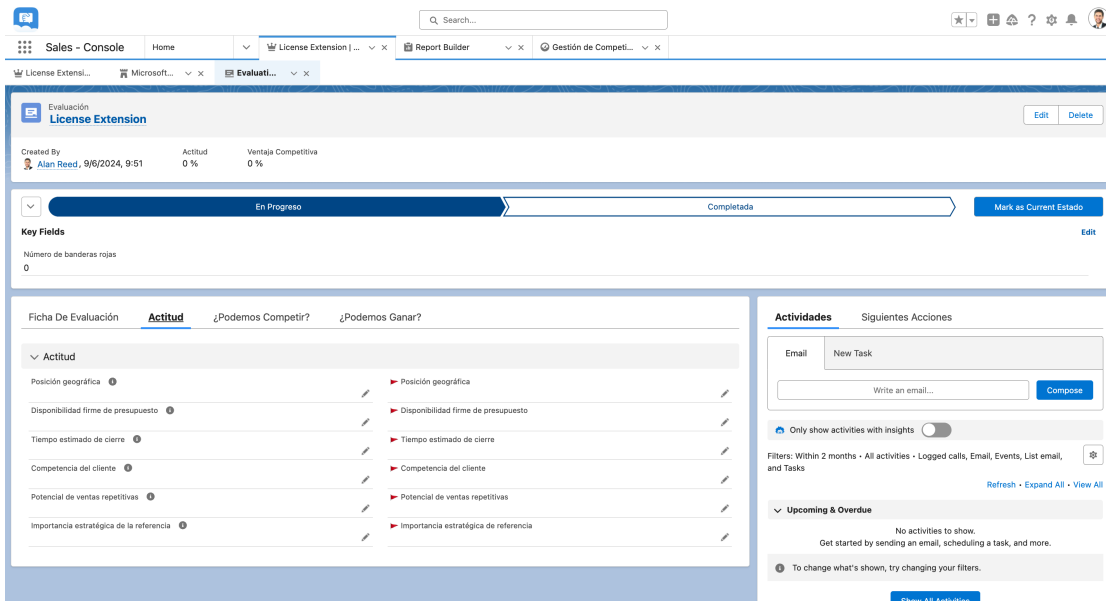


Figure 4.12: Evaluation Sheet

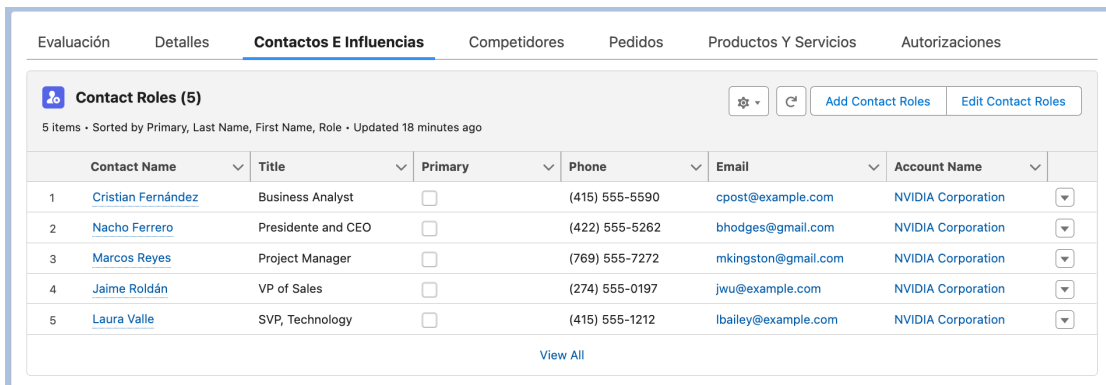


Figure 4.13: Contacts and Influencers within an opportunity

This information can be used to create advanced relationship trees such as with Altify

1. Salesforce enables developers to use javascript to develop components to use within the platform, utilizing the available data within the users Salesforce instance.

A relationship map has its focus on understanding the structure of the decision-

<sup>1</sup>Altify Relationship Map. <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3000000B3gIEAJ>

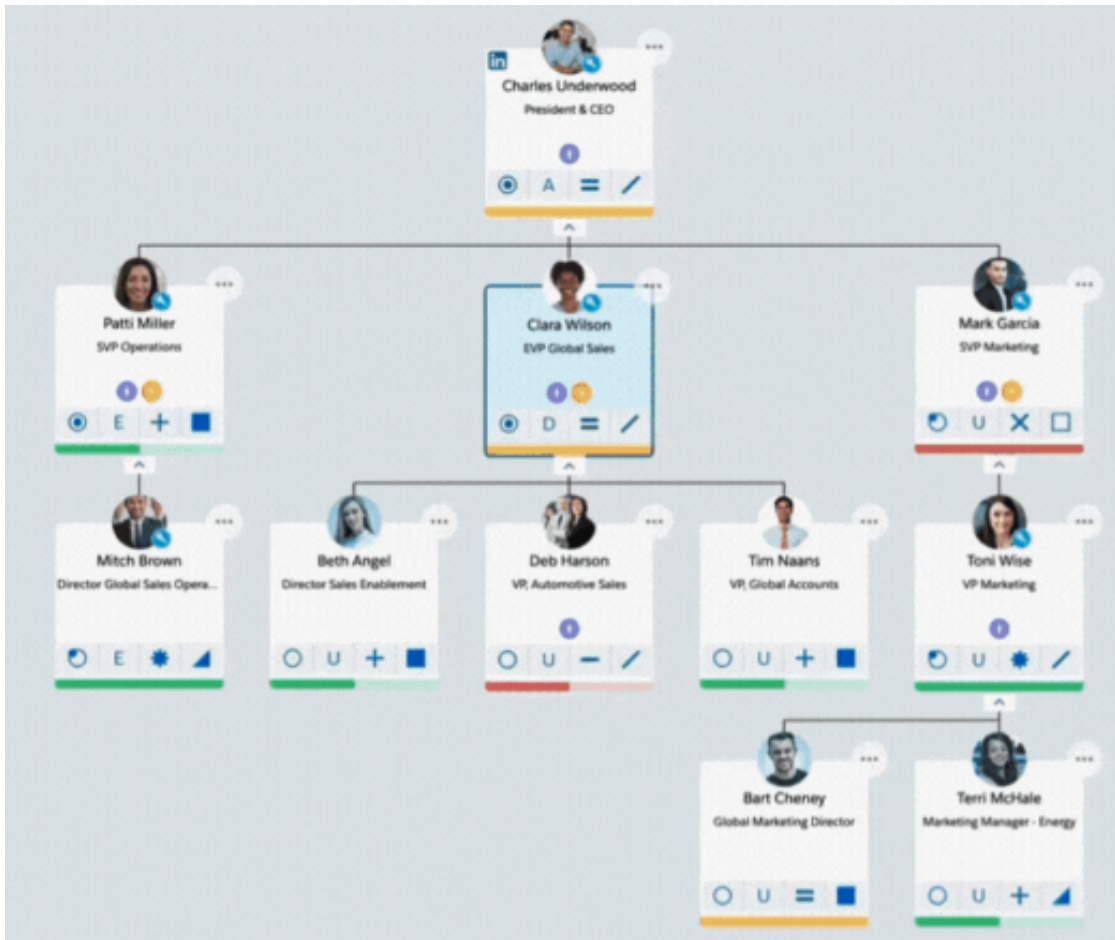


Figure 4.14: Altify Relationship Map

making process and the relationship to each player within the account, represented by the colors under each contact.

### Homogenize the sales process

To homogenize the sales process, Cadences and Work Queues are used within the Salesforce Platform.

A Cadence is a decision tree that takes each opportunity through the tree's branches



depending on its results on the criteria that are taken into account. It can be designed by managers to design paths for opportunities based on their interactions, call results, email responses and other criteria, guiding the sales representative through a sale. Additionally, custom automations can be added to the tree, to send personalized emails to customers when the opportunity reaches the desired state.

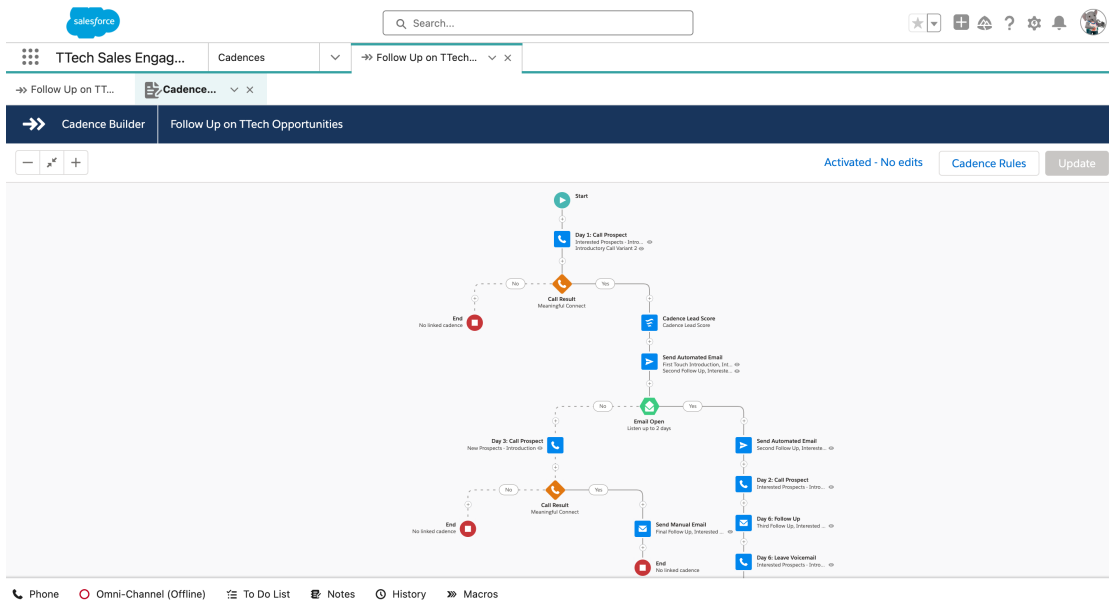


Figure 4.15: Sales Engagement - Cadence

Opportunities can be assigned to a Cadence by a manager, for sales representatives to follow the instructions, and homogenize their approach to certain groups of opportunities, based on their characteristics.

Work Queue is used by sales representatives to have a holistic view of their assigned opportunities which are part of a Cadence. It is a simplified application that puts all opportunities in a list, based on their priority. The priority of opportunities can be assigned by integrated machine learning models, which have learnt from previous opportunities, understanding which are more likely or less likely to close successfully.

Other priority indicators may be manual variables based on strategic importance or previous sales.

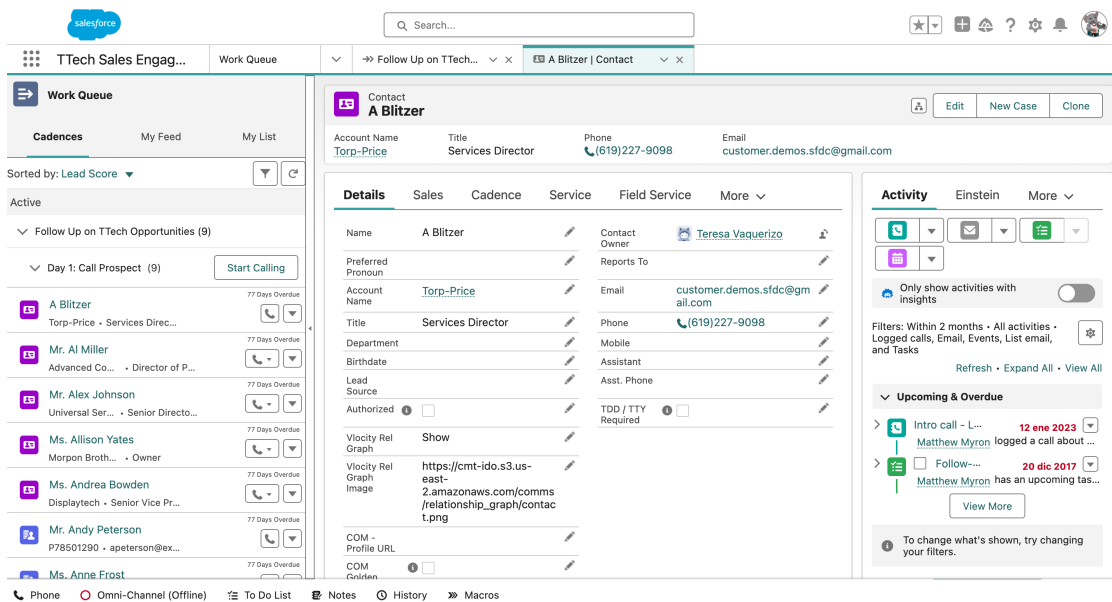


Figure 4.16: Sales Engagement - Work Queue

On the left hand of Figure 4.16, the list of opportunities by priority and stage is shown to the sales representative. The actions "Start Calling" can be used to begin contacting the opportunities' contacts in order. On the right hand, all relevant information

Opportunities can then be approached by sales representatives based on their step in the cadence and being prioritized by their importance, simplifying the process and automating decision making of sellers. Following the desired methodology by upper management or experts on sales methodologies. Instructions to follow steps from The Miller Heiman Methodology can also be imposed, such as filling in the evaluation matrix, completing the competitor study or guidance on how to approach the client and sell the product or service.

## Analyze competitor information

The next aspect of the demonstration is the competitor management capabilities of the solution. A custom package is developed and implemented to manage the competitor information between opportunities and accounts.

First, a "Competitor" entity is created to save the information about firms and competitors. Second, a "Opportunity Competitor" entity is created to match the competitors to opportunities on a one-to-many basis. Therefore, one opportunity can have many competitors, and one competitor can be in many distinct opportunities. TO the view of the user, it is another tab in the opportunity record called "Competitors", where each competitor is added, specifying the price offered and the number of won and lost opportunities against this competitor across the CRM.

|   | Competidor Oportunidad: Competencia O... | Competidor Oportunidad: Precio Ofertado ↑ | Competid... | Competido... |                          |
|---|------------------------------------------|-------------------------------------------|-------------|--------------|--------------------------|
| 1 | <input type="checkbox"/> Microsoft       | USD 10.000,00                             | 0           | 0            | <input type="checkbox"/> |
| 2 | <input type="checkbox"/> Oracle          | USD 13.500,00                             | 0           | 0            | <input type="checkbox"/> |

[View All](#)

Figure 4.17: Competitor Package

## Automated Onboarding tutorials

Finally, to make the onboarding experience faster and more productive for new users, in-app guidance is used. The In-App Guidance functionality is integrated within the Salesforce platform to enable fast and autonomous learning. It can be configured to be shown a specific number of times to a user, so it does not become repetitive, and will

only show to users who have not seen disabled it beforehand.

The tutorials are then added to a global menu in the top right corner called "Help Menu" that redirects the users to the page where the tutorial takes place. It is a custom step-by-step sequence that allows the user to follow steps across the screen.

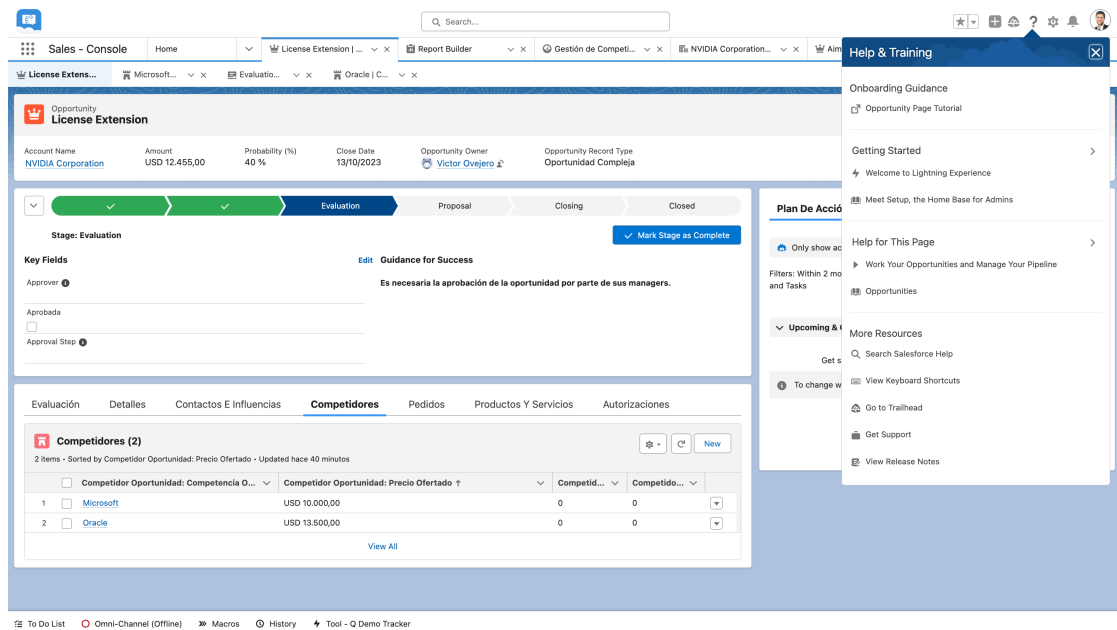


Figure 4.18: Help Menu

The solution proposed is a product demonstration of how The Miller Heiman Methodology could be introduced into the Salesforce Platform. Therefore, numerous functionalities, customizations, designs and developments have been made for a final, functioning product demonstration. The objective of the solution is to demonstrate that a sales methodology can be translated to software and large sales teams, while determining the advantages of implementing it.

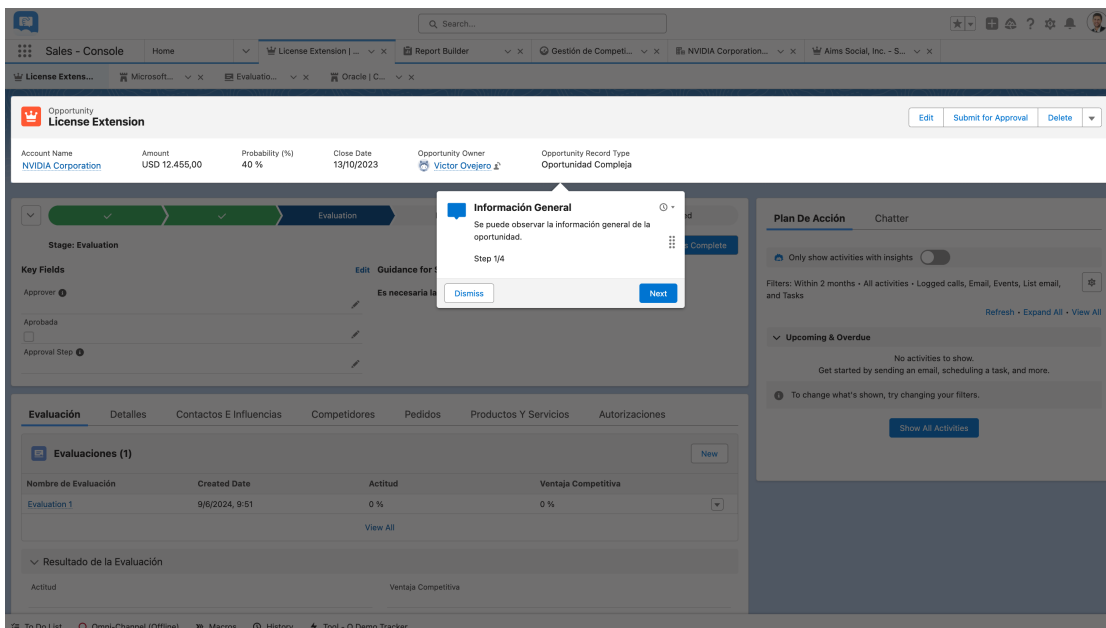


Figure 4.19: In-App Guidance



# Chapter 5

## Conclusion

### 5.1 Salesforce Value Map

The given Salesforce Value Map presents an executive summary of how The Miller Heiman Sales Methodology is implemented on the Salesforce Platform, with the objective of improving the efficiency and effectiveness of sales teams. This map shows how business objectives are connected to certain objectives, Salesforce features, and measures, providing a clear and detailed plan to enhance sales operations and results.

The first business objective depicted in the value map is to align the Salesforce Platform as per the Miller Heiman Sales Methodology. This adaptation is intended to help optimize the efficiency and effectiveness of sales professionals. To achieve this, the following objectives are outlined: Firstly, the process of qualifying opportunities based on the integrated customer data is crucial and requires the unification of customer data. When data is combined, it allows the sales teams to make better decisions based on the information they have acquired. Secondly, it helps to standardize the sales process



Figure 5.1: Salesforce Value Map

to make it easier for the salespeople and to avoid confusion among the sales team. This standardization assists in keeping the sales approach consistent, which is crucial for achieving scale and assessing performance. Thirdly, it is crucial to know who the competitors are and how best to deal with them in order to stay ahead. This involves the use of data and insights to analyse competitor actions and positioning properly. Finally, the decision-making hierarchy and in-app guidance help to streamline the process of training new sales representatives by understanding the decision-making tree within clients' organizations and providing automated in-app guidance.

To these ends, the Salesforce platform provides several features. The opportunity qualification is made easier through enhanced management tools and a strong Sales Cloud Data Model (DMO). These tools help the sales teams to evaluate the opportunities effectively and in a more holistic manner. Cadence enables the automation of opportu-



nity management according to its state, while Workflows assist in decision-making for salespersons, which keeps the process of selling flexible. Also, it is possible to extend the DMO to include competitor information, which will be useful to the sales teams for strategic purposes. Competitive insights within each opportunity enhance its management and positioning within the competitive environment. Furthermore, understanding the decision-making processes of the client organization and offering in-app tips makes the onboarding process of new sales representatives more efficient and effective, because new employees are introduced to the organization's sales approaches and strategies in the shortest possible time.

The effectiveness of these capabilities and objectives is measured through specific metrics: The effectiveness of these capabilities and objectives is measured through specific metrics:

- Sales Success Rate
- Lead Conversion
- Sales Representative Productivity
- Sales Cycle Time
- Competitive Advantage
- Opportunity Management
- Customer Satisfaction (CSAT)
- Onboarding Time

In conclusion, the Salesforce Value Map gives a detailed description of how it is possible to use the capabilities of Salesforce to align with the Miller Heiman Sales Methodology. This way, organizations can improve the productivity and effectiveness of the sales force by providing them with a single customer database, streamlining the sales process, controlling competition, and gaining insight into decision-making frameworks. The above-stated measures provide clear signs of the progress and efficiency of the strategic goals and objectives, as well as the achievement of the goals.

## **5.2 Managerial Implications**

The adoption of the Salesforce Platform based on the Miller Heiman Sales Methodology has major managerial implications that require a new approach to how the sales processes are managed and improved. The first and arguably one of the most significant managerial implications of the study is the need to ensure proper data management. Managers must ensure that customer data is gathered accurately, integrated, and stored systematically in the Salesforce platform. Besides, this centralized data repository helps not only in better opportunity qualification but also in giving the managers a complete view of the customer behaviour and the sales trend which in turn helps in better decision making and strategic planning.

The second managerial implication is the issue of the degree of sales process standardisation. Managers will have to ensure that the team implements the uniform sales processes, and all the salespeople use Cadences and Work Queues for managing opportunities. This standardization is important to ensure that there are set approaches to the sales processes, which will in turn help in the evaluation of performance and

the revelation of areas that require change. The managers will be responsible for the training of their subordinates and the implementation of the new processes, stressing on the compliance with the new procedures and using the tools that are provided to them to the full extent.

The decision to incorporate competitor information into the Salesforce platform adds a new perspective to competitive strategy management. For the customized DMO to be effective, managers have to interact with it in order to analyze competitor data and gain insights from it. This makes it possible for firms to develop more effective counter-strategies and position themselves better against their competitors. Managers will have to cultivate the state of alertness and readiness, making sure their subordinates are capable of identifying potential threats from competitors. This means that strategies have to be updated often with the latest competitor intelligence that is available in the platform.

Also, the emphasis on studying decision-making systems within the client organizations requires a managerial focus on relationship management and organizational intelligence. Managers need to make sure that their sales representatives know how to deal with decision-making structures and have appropriate tools within the app to do so. This means constant coaching and development of sales personnel to ensure that they can properly interact with the clients and other decision makers in the buyer organization. Managers will need to periodically update the in-app guidance they have given and ensure that it is helpful and relevant to the sales representatives.

Lastly, the automation and optimization of the onboarding program for new sales representatives are highly significant for managers. Managers need to integrate the process of onboarding to ensure that it does not take a long time before newcomers start contributing to the company. This entails using the in-app guidance to ensure that new

sales representatives are trained adequately and assisted to adapt to the prescribed sales processes and tools. Managers also have to oversee the performance of new hires and offer them further assistance with the integration into the team if necessary.

In conclusion, the purpose of this paper is to carry out the implementation of the Salesforce Platform in accordance with the Miller Heiman Sales Methodology. This project has a number of managerial implications which require a proactive, strategic approach. In this implementation, managers are required to pay attention to data management, process standardization, competitive strategy, relationship management, and efficient onboarding to realize the full potential of this implementation. By addressing these implications, managers can improve the effectiveness and efficiency of their sales force, thus contributing to the achievement of the goals outlined in the Salesforce Value Map.

### **5.3 Future Developments**

Moving forward, the use of the Salesforce Platform in conjunction with the Miller Heiman Sales Methodology has set the stage for several other features that can be built to further improve sales and strategic functions. A key area for additional improvement is the current integration of big data and analytics, as well as artificial intelligence. Today, the Salesforce platform uses AI and machine learning to scan large volumes of data, learn from them, and make sales forecasts. Such predictive analytics capabilities help managers and sales teams to better understand their customers' needs, fine-tune their sales approaches, and make better decisions. Subsequent versions could offer more detailed analysis and enhanced predictive algorithms, offering even greater levels of

accuracy.

Furthermore, it also has rich customer engagement features that are compatible with social media and other channels. These tools allow the salespeople to interact with the clients in an efficient and appropriate manner. In the future, it is possible to build on these omni-channel engagement features to achieve better synchronization and relevance of all the customer touch points with the ultimate goal of increasing customer satisfaction and loyalty. The onboarding and training facilities in the application at the current moment are presented by detailed instructions and constant training of sales representatives. This could be further developed by adding videos and creating a curated database with instructions for other unforeseen occurrences and more advanced functionalities.

Finally, the platform involves dynamic and adaptive competitor analysis tools that allow the tracking of competitors' activities and market conditions in real-time. These tools give the sales teams the latest information and insights to market and sales developments, which enables them to counter threats and capitalize on opportunities as soon as possible. Future improvements could be the integration of better analytical features in these tools that would give better insights and intelligence.

In conclusion, the current sophisticated components of the Salesforce Platform that is in harmony with the Miller Heiman Sales Methodology offers many possibilities for additional enhancement. Improving the accuracy of predictive models, the effectiveness of the customer interface, virtual training, data protection, and competitor analysis will further improve productivity and sales success for the sales teams, and will help the organization remain competitive and relevant in an increasingly dynamic business environment.



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