Deploying a CRM system in practice — Understanding the user experience

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Abstract The purpose of this study is to investigate users' perception of Salespoint.com, which is a web-based CRM software application developed by Marketpoint, UK. An online survey was administered to 206 users from six international companies. The findings of the study suggest that usefulness of marketing database search, ease of navigation and usefulness of statistics functions are the key aspects of overall satisfaction with Salespoint.com. Users' intention to recommend is positively influenced by usefulness of marketing database search, ease of navigation and degree of customisation. The study discusses theoretical and practical implications for improving the quality of web-based CRM softwares from the user's point of view.

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INTRODUCTION

Salespoint.com is a web-based CRM software application developed by Marketpoint in 1997. Marketpoint is based in Bracknell, UK, and specialises in database marketing services. Its ASP-based approach, Salespoint.com, faces competition from rival products such as Salesforce.com, Siebel, Act, Maximizer and Goldmine.

To respond to the competitive threats, Marketpoint wanted to understand the experience of its users better and identify opportunities for deployment of more advanced versions of Salespoint. Peter Gillett, Managing Director of Marketpoint, commissioned the University of Surrey School of Management team to research how Salespoint software is perceived by it.

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This paper documents the outcomes of this research.

The specific objectives of the research were:

- to understand the profile of existing users/non-users;
- to estimate potential demand for the Salespoint Pocket PC version;
- to explore the perceived strengths and weaknesses of Salespoint;
- to explore perceived benefits of Salespoint as a CRM tool;
- to compare users' experience across companies;
- to identify any training needs for Salespoint users.

METHODOLOGY

To fulfil the survey objectives, an instrument to measure user's experience and perception of Salespoint.com was developed. The Salespoint User Experience Survey was designed as an online version and was administered to users in seven main respondent companies: *Company A*, *Company B*, *Company C*, *Company D*, *Company E*, *Company F* and *Company G*. Currently, Salespoint.com has more than 3,000 registered users but not all are active users. A representative sample of respondents including 800 active users was selected from the seven companies to participate in the survey. Data were collected over four months from 1st April to 10th July, 2006. E-mails with a link to the online version of the questionnaire were sent to selected participants. As an incentive, all respondents

Figure 1: Sample representation by gender ($n=206$)

were entered into a free draw with the chance to win an iPod Nano.

In terms of data analysis, descriptive (means, standard deviations, modes) and inferential statistics (correlations, multiple regressions, factor analysis, ANOVA, t -tests) were used. The reliability and validity of the survey instrument was tested using Cronbach's alpha coefficients and multivariate statistical techniques.

PROFILE OF RESPONDENTS

A total of 301 users logged on the Salespoint User Experience Survey. Of these, 206 users representing a response rate of 68 per cent participated in the survey.

Gender

Figure 1 presents the gender distribution of the sample.

From Figure 1, 65 per cent of respondents who participated in the survey were males and 35 per cent were females.

Age group

Figure 2 depicts the sample representation by age group.

In terms of age group, 5 per cent of respondents were between 16 and 24 years of age, 27 per cent were between 25 and 34, 39 per cent were between 35 and 44, 22 per cent in the age range of 45–54 and 7 per cent above 54 years old.

Salespoint users by company

A total of 206 Salespoint users across seven companies responded to the survey. Table 1

Figure 2: Sample representation by age ($n=205$)

Table 1: Sample representation by company ($n=206$)

Client name	Number of clients	Number of responses	Per cent of responses	Per cent of companies
Company G	276	84	30	41
Company C	350	75	22	36
Company D	62	23	37	11
Company F	57	11	19	5
Company A	47	7	15	3
Company B	7	3	43	2
Company E	10	3	30	2
Other companies	19	—	—	—
Total	828	206	25%	100%

Table 2: Sample representation by position ($n=205$)

Position	Responses (%)
Sales representative	34
Sales manager	16
Marketing/sales assistant	11
Marketing manager	7
Area manager	6
Others	26
Total	100%

presents number of respondents from each of the clients.

From Table 1, the majority of users responding to the survey were from Company G (41 per cent) and the least number of respondents were from Company B and Company E with only three responses each.

Current position in the company

Table 2 shows the sample representation by position.

In terms of current position in the company, the majority of respondents were sales representatives (34 per cent), 16 per cent were sales managers, 11 per cent were marketing/sales assistants, 7 per cent marketing managers and 6 per cent area managers. The remaining 25.9 per cent position was considered as 'others' who identified their position as follows:

Business development manager, team leader, channel partner manager, customer care specialist, estimating coordinator,

estimator, estimator, events assistant, general manager, inside media specialist, instrument specialist, key account manager, leads manager, managing director, operations manager, order processor, partner manager, product specialist, purchasing manager, sales analyst, sales coordinator, sales order checker, schools programme coordinator, senior account coordinator, senior account coordinator, team leader, technical support specialist, tele sales manager, VP international sales and marketing.

Number of years in current position

Figure 3 shows number of years working in current position.

From Figure 3, the majority of respondents (38 per cent) have been in their current position for over five years. Around 13 per cent revealed that they have only been working in their current position for less than one year, while 26 per cent of respondents have been in their position between one and three years.

Number of years working in the company

Figure 4 illustrates number of years working in the company.

A high proportion of respondents (50 per cent) have been working in the company for more than four years. Twenty-five per cent have been with the company for 2–4 years, 12 per cent for less than one year and 11 per cent for 1–2 years.

Figure 3: Number of years working in current position ($n=206$)

Figure 4: Number of years working in the company ($n=206$)

Average log on to Salespoint in a typical working week

Figure 5 shows average log on to Salespoint in a typical working week.

From Figure 5, 27 per cent of respondents reveal that they log on to Salespoint once a week, 17 per cent log on five times, 13 per cent 3–4 times, 10 per cent twice per week. Approximately 19 per cent reveal that they do not log on to Salespoint at least once a week, while 14 per cent have a weekly log on of more than five times. Further analyses were carried out to better understand the profile of both *heavy* users (five times or more weekly

log on) and *non-users*. Table 3 presents the characteristics of the non-users and heavy users.

From Table 3, in terms of occupation, non-users were mainly the ‘others’ category users (38 per cent) and sales representatives (20 per cent). Company C had the highest proportion of non-users (52 per cent) followed by Company D (25 per cent) and Company G (23 per cent). Non-users were mostly between the 35–44 age group (44 per cent) and 45–54 age range (31 per cent). On the other hand, a high proportion of heavy users were from Company G (43 per cent), were mostly sales representatives

Figure 5: Weekly log on to Salespoint ($n=205$)

Table 3: Characteristics of non-users and heavy users

User characteristics	Non-users ($n=39$) (%)	Heavy users ($n=63$) (%)
Age		
16–24	5	11
25–34	13	35
35–44	44	33
45–54	31	15
55–64	5	6
Over 64	2	—
Total	100	100
Occupation		
Area manager	8	8
Marketing manager	8	8
Sales manager	18	14
Sales representatives	20	31
Marketing/sales assistant	7	13
Others	38	26
Total	100	100
Company		
Company A	—	6
Company B	—	—
Company C	52	17
Company D	25	16
Company E	—	2
Company F	—	16
Company G	23	43
Total	100	100

(31 per cent) and were relatively young with 35 per cent in the 25–34 age group and 33 per cent in the 35–44 age range.

Average use of Salespoint in a typical working day

Figure 6 shows the daily use of Salespoint.

From Figure 6, respondents do not seem to spend much time on Salespoint on a typical working day with 49 per cent revealing to spend less than 15 minutes, 32 per cent between 15 and 30 minutes, 9 per cent spending between 15 and 30 minutes. Only a small proportion of respondents (4 per cent) have an average use over two hours in a typical working day. Further analyses were carried out to better understand the profile of both *light* users (average daily use of less than 15 minutes) and *heavy* users (average daily use of one hour and above). Table 4 presents the characteristics of the light- and heavy-user segments.

From Table 4, in terms of occupation, light users were mainly from the 'others' category with 30 per cent. Company C had the highest proportion of light users (45 per cent) followed by Company G (35 per cent) and Company D (11 per cent). Light users were mostly between the 35–44 age group (38 per cent) and 45–54 age range (27 per cent). On the other hand, a high proportion of heavy users were from Company G (43 per cent), were mostly sales representatives (39 per cent) and were relatively young with a high proportion (over 80 per cent) in the 25–44 age group.

Figure 6: Daily use of Salespoint ($n=203$)

Table 4: Characteristics of light and heavy users

User characteristics	Light users ($n=99$) (%)	Heavy users ($n=21$) (%)
<i>Age</i>		
16–24	4	14
25–34	25	48
35–44	38	33
45–54	27	5
55–64	5	—
Over 64	1	—
Total	100	100
<i>Occupation</i>		
area manager	7	10
Marketing manager	4	—
Sales manager	23	5
Sales representatives	27	39
Marketing/sales assistant	9	19
Others	30	27
Total	100	100
<i>Company</i>		
Company A	3	5
Company B	1	—
Company C	45	5
Company D	11	28
Company E	1	—
Company F	4	19
Company G	35	43
Total	100	100

Awareness of the availability of Salespoint in Pocket PC version

Figure 7 presents awareness of the Salespoint Pocket PC version.

From Figure 7, the majority of respondents (77 per cent) were unaware that Salespoint was available in a Pocket PC version with only 23 per cent being aware of the existence of such an option. Further analyses were carried out to better understand the profile of both users who were aware and unaware of the Salespoint Pocket PC version. Table 5 presents the characteristics of aware and unaware users.

From Table 5, in terms of user occupation, those who were unaware of the Salespoint Pocket PC version were mainly sales representatives (33 per cent). A high proportion of unaware users were from Company G (44 per cent), were mostly sales representatives (33 per cent) and were equally relatively young with 27 per cent in the 25–34 age group and 39 per cent in the 35–44 age range.

Aware users were relatively young with the majority of them being between 35–44 (39 per cent) and 25–34 (28 per cent) age groups. The highest proportion of aware users is sales representatives (38 per cent). Company G had the highest proportion of aware users (32 per cent) followed by Company C (30 per cent) and Company D (23 per cent). Only a small proportion of area managers (2 per cent) and marketing managers (11 per cent) were aware of this version.

Figure 7: Awareness of Salespoint Pocket PC version (n=206)

Figure 8: Usage of Salespoint Pocket PC version (n=73)

Table 5: Characteristics of users who are aware and unaware of Pocket PC version of salespoint

User characteristics	Unaware of Salespoint Pocket PC version (n=159) (%)	Aware of Salespoint Pocket PC version (n=46) (%)
<i>Age</i>		
16–24	3	13
25–34	27	28
35–44	39	39
45–54	23	18
55–64	7	2
Over 64	1	—
Total	100	100
<i>Occupation</i>		
Area manager	8	2
Marketing manager	6	11
Sales manager	18	11
Sales representatives	33	38
Marketing/sales assistant	9	17
Others	28	21
Total	100	100
<i>Company</i>		
Company A	4	2
Company B	1	2
Company C	39	30
Company D	7	23
Company E	2	—
Company F	4	11
Company G	44	32
Total	100	100

Usage of Salespoint Pocket PC version

Figure 8 illustrates the usage of Salespoint Pocket PC version.

From Figure 8, out of those respondents being aware that Salespoint was available in a Pocket PC version, the majority of them (84 per cent) revealed that they have never used the Pocket PC version of Salespoint with only 16 per cent stating to have ever used this version. Further analyses were carried out to better understand the profile of both users and non-users of Salespoint Pocket PC version. Table 6 presents the characteristics of users and non-users.

From Table 6, in terms of occupation, non-Salespoint Pocket PC users were mainly respondents in the 'others' occupation category (28 per cent) and sales representatives (26 per cent). Company C had the highest proportion of Pocket PC users (42 per cent) followed by Company C (42 per cent) and Company D (16 per cent).

Salespoint Pocket PC users were relatively young with the majority of them (84 per cent) being between 25 and 44. On the other hand, a high proportion of Salespoint Pocket PC users were from Company C (50 per cent), were mostly sales representatives (59 per cent) and sales managers (25 per cent).

Interest in using Salespoint Pocket PC version in the near future

Figure 9 presents interests in using Salespoint Pocket PC version.

From Figure 9, the majority of respondents (68 per cent) show no interest in using Salespoint Pocket PC version in

Table 6: Characteristics of Salespoint Pocket PC users and non-users

User characteristics	Salespoint Pocket PC non-users (n=61) (%)	Salespoint Pocket PC users (n=12) (%)
<i>Age</i>		
16–24	10	—
25–34	30	34
35–44	32	50
45–54	23	8
55–64	5	8
Over 64	—	—
Total	100	100
<i>Occupation</i>		
Area manager	6	—
Marketing manager	10	—
Sales manager	15	25
Sales representatives	26	59
Marketing/sales assistant	15	8
Others	28	8
Total	100	100
<i>Company</i>		
Company A	5	0
Company B	—	8
Company C	42	8
Company D	16	17
Company E	—	—
Company F	7	17
Company G	30	50
Total	100	100

Table 7: Characteristics of the users interested in Salespoint Pocked PC version

User characteristics	Interested in Pocket PC (n=40) (%)
<i>Age</i>	
16–24	—
25–34	28
35–44	42
45–54	25
55–64	5
Over 64	—
Total	100
<i>Occupation</i>	
Area manager	10
Marketing manager	13
Sales manager	20
Sales representatives	40
Marketing/sales assistant	3
Others	15
Total	100
<i>Company</i>	
Company A	5
Company B	3
Company C	40
Company D	5
Company E	—
Company F	8
Company G	40
Total	100

Figure 9: Interest in using Salespoint Pocket PC version (n=82)

the near future. Further analyses were carried out to better understand the profile of both interested and uninterested users of Salespoint Pocket PC version. Table 7 presents the characteristics of users who are interested in using Salespoint Pocket PC version.

From Table 7, interested users were mostly sales representatives (40 per cent) and sales managers (20 per cent). A significant proportion of marketing managers (13 per cent) and area managers (10 per cent) also showed some interests. Interested users were mostly (42 per cent) in the 35–44 age groups and were from Company C (42 per cent) and Company G (40 per cent).

Interests in accessing Salespoint contacts via mobile phone

Figure 10 illustrates interests in accessing Salespoint contacts via mobile phone.

From Figure 10, a significant proportion of (35 per cent) respondents reveal an interest in assessing Salespoint contacts via a mobile phone, while the majority of them (65 per cent) have no interest in using such an option. Further analyses were carried out to better understand the profile of both

Figure 10: Interest in accessing Salespoint contacts via mobile phone ($n=204$)

interested and uninterested users in accessing Salespoint contacts via a mobile phone. Table 8 presents the characteristics of users who are interested in accessing Salespoint contacts via a mobile phone.

From Table 8, for the interested group, a high proportion of them were from Company G (53 per cent) and Company C (30 per cent). Not surprisingly, interested users were mostly sales representatives (49 per cent) followed by sales managers (21 per cent). Interested users were relatively young with a high proportion (77 per cent) of them being in the 25–44 age groups.

KEY USER BENEFITS

Respondents were asked to rate their level of agreement on a series of statements relating to how Salespoint has benefited the company in general, its sales and marketing and customer service. Responses were captured on a five-point scale ranging from *Strongly Disagree* to *Strongly Agree*, and where ‘not applicable’, respondents had to tick the N/A column.

The interpretations of mean scores are as follows:

Mean (average) scores	Interpretation
Below 2.00	Strongly disagree
Between 2.00 and 2.99	Tend to disagree
Between 3.00 and 3.40	Tend to agree
Between 3.41 and 4.00	Agree
Above 4.00	Strongly agree

In terms of loyalty score, which is calculated by including only ratings of 4 and 5 from

Table 8: Characteristics of users who are interested in accessing Salespoint contacts via a mobile phone

User characteristics	Interested in accessing Salespoint contacts via mobile phone ($n=71$) (%)
Age	
16–24	1
25–34	33
35–44	44
45–54	18
55–64	3
Over 64	1
Total	100
Occupation	
Area manager	8
Marketing manager	6
Sales manager	21
Sales representatives	49
Marketing/sales assistant	2
Others	15
Total	100
Company	
Company A	4
Company B	—
Company C	30
Company D	6
Company E	—
Company F	9
Company G	53
Total	100

respondents, a score of 60 per cent is considered as minimum.

Company level

From Table 9, overall, respondents revealed that Salespoint had benefited their company with mean scores of the statements ranging from 2.54 to 3.51 and standard deviations from 0.88 to 1.09. The statement ‘Salespoint has helped our company to keep up-to-date customer contact information’ was rated highest at a score of 3.51 (s.d.=1.09) and ‘Salespoint has helped to maintain our sales training costs to a minimum’ the lowest at a mean value of 2.54 (s.d.=0.88). The statement ‘Salespoint has helped our company to grow business’ was rated at 3.18 (s.d.=1.05).

Table 9: Key user benefits: company level

Benefits to your company	N	Mean*	s.d.	Loyalty scores (%)
Salespoint has helped our company to keep up-to-date customer contact information.	141	3.51	1.09	61
Salespoint has helped our company provide sales related information to its remote staff.	130	3.18	1.06	44
Salespoint has helped our company to improve its marketing efficiency.	130	3.18	1.05	42
Salespoint has helped our company to grow business.	129	3.10	0.96	35
Salespoint has simplified our sales planning processes.	133	2.93	1.08	32
Salespoint has improved our customer satisfaction.	127	2.83	0.99	24
Salespoint has enabled our company to save money.	127	2.83	0.95	22
Salespoint has reduced our customer acquisition costs.	125	2.79	0.89	17
Salespoint has helped to maintain our sales training costs to a minimum.	123	2.54	0.88	10

*Items measured on a five-point scale with 1=Strongly Disagree and 5=Strongly Agree

Table 10: Key user benefits: sales and marketing

Sales and marketing	N	Mean*	s.d.	Loyalty scores (%)
Salespoint has reduced the search time for customer information.	146	3.38	1.15	54
Salespoint has helped me to identify future sales opportunities.	135	3.16	1.13	50
Salespoint has improved my work productivity.	143	3.14	1.18	44
Salespoint has reduced the search time for sales information.	143	3.10	1.20	43
Salespoint has simplified my sales planning process.	126	2.99	1.15	41
Salespoint has enabled me to develop new business through existing customers.	128	2.97	1.05	35
Salespoint has increased my efficiency of communication with my colleagues.	145	2.96	1.12	36
Salespoint has helped me to produce reports rapidly.	130	2.85	1.16	32
Salespoint has helped me to plan my work better.	135	2.83	1.10	29
Salespoint has helped me to close deals faster.	121	2.69	1.00	24
Salespoint has enabled me to increase revenue through up-selling and cross selling.	123	2.60	1.03	21

*Items measured on a five-point scale with 1=Strongly Disagree and 5=Strongly Agree

Sales and marketing

From Table 10, overall, respondents revealed that Salespoint had benefited the company sales and marketing activities with mean

scores of the statements ranging from 2.60 to 3.38 and standard deviations from 1.00 to 1.20. The statement 'Salespoint has reduced the search time for customer

information' was rated highest at a score of 3.38 (s.d.=1.15) and 'Salespoint has enabled me to increase revenue through up-selling and cross selling' the lowest at a mean value of 2.60 (s.d.=1.03). The statement 'Salespoint has enabled me to develop new business through existing customers' was rated at 2.97 (s.d.=1.05).

Customer service

From Table 11, overall, respondents revealed that Salespoint had benefited the company customer service with mean scores of the statements ranging from 2.75 to 3.01 and standard deviations from 0.89 to 1.08. The statement 'Salespoint has increased my efficiency of communication with clients' was rated highest at a score of 3.01 (s.d.=1.04) and 'Salespoint has helped me to understand my clients better' the lowest at a mean value of 2.75 (s.d.=1.04). The statement 'Salespoint has increased my customer retention' was rated at 2.98 (s.d.=0.89).

QUALITY OF SALESPPOINT

Salespoint users rated the quality of Salespoint software on a five-point scale with (1) being 'Very Poor' and (5) being 'Very Good'.

The interpretations of the mean scores and the loyalty scores are as follows:

Mean (average) scores	Interpretation
Below 2.00	Very Poor
Between 2.00 and 2.99	Poor
Between 3.00 and 3.40	Acceptable
Between 3.41 and 4.00	Good
Above 4.00	Very Good

In terms of loyalty scores, which are calculated by including only ratings of 4 and 5 from respondents, a score between 60 and 70 per cent is considered as loyal, 70–80 per cent as very loyal and above 80 per cent as extremely loyal. Table 12 summarises the mean scores for each of the 16 attributes.

From Table 12, overall, users found the various aspects of Salespoint to be of acceptable level with mean scores ranging from 2.90 to 3.73 and standard deviations from 0.85 to 1.13. Reliability of the system was rated good (mean=3.73; s.d.=0.94), whereas degree of customisation poor (2.90; s.d.=1.13). User friendliness was rated at 3.18 (s.d.=1.09) and ease of navigation at 3.10 (s.d.=1.11).

OVERALL USER SATISFACTION AND INTENTION TO RECOMMEND

Salespoint users were asked to rate their overall level of satisfaction with Salespoint

Table 11: Key user benefits: customer service

Customer service	N	Mean*	s.d.	Loyalty scores (%)
Salespoint has increased my efficiency of communication with clients.	133	3.01	1.04	41
Salespoint has enabled me to achieve better customer care.	134	3.00	1.07	38
Salespoint has increased my customer retention.	122	2.98	0.89	29
Salespoint has reduced my response time and request-resolution times.	130	2.97	1.06	35
Salespoint has enabled me to have better co-ordination with my work colleagues.	133	2.96	1.08	36
Salespoint has helped me to understand my clients better.	131	2.75	1.04	28

*Items measured on a five-point scale with 1=Strongly Disagree and 5=Strongly Agree

Table 12: Quality of Salespoint: mean, standard deviations, loyalty scores

Attributes	N	Mean*	s.d.	Loyalty scores (%)
Reliability of the system	138	3.73	0.94	63
Responsiveness of support service	106	3.65	0.98	59
Loading/connection time	150	3.58	1.04	53
Ease of searching customer database	149	3.33	1.02	46
Ease of obtaining information about customers and sales	148	3.29	1.03	45
Accessibility to popular software programmes (eg Excel, Microsoft Word)	102	3.26	0.94	44
Customer profiling.	133	3.26	1.04	41
Quality of documentation (eg Reports, Templates)	119	3.21	0.94	38
Usefulness of marketing database search	125	3.20	1.05	44
User friendliness	146	3.18	1.09	39
Attractiveness of layout and graphic style	147	3.14	0.88	35
Ease of navigation	150	3.10	1.11	38
Clarity of directions and guidelines	141	3.10	0.96	34
Usefulness of the statistics function	102	3.06	0.85	28
Usefulness of the bulletin board	105	2.91	0.96	29
Degree of customisation according to your needs	111	2.90	1.13	33

*Items measured on a five-point scale with 1=Very Poor and 5=Very Good.

Table 13: Overall user satisfaction and intention to recommend

	N	Mean	s.d.	Loyalty scores (%)
Overall, how satisfied/dissatisfied are you with Salespoint?*	158	3.05	1.08	38
If you were advising a friend or colleague outside your company on their choice of contact management software, how likely would you recommend Salespoint?†	158	2.94	1.14	34

*Item measured on a five-point scale with 1=Very Dissatisfied and 5=Very Satisfied.

†Item measured on a five-point scale with 1=Very Unlikely and 5=Very Likely.

and their likelihood of recommending the software to an outside friend or colleague. Table 13 presents the mean scores and standard deviations.

From Table 13, respondents were neither dissatisfied nor satisfied with Salespoint software with a mean score of 3.05 and a standard deviation of 1.08. The study found positive relationship among usage experience, age and user satisfaction. This finding indicates that as the user experience increases, their satisfaction tends to increase.

Overall satisfaction with Salespoint seems to differ across age groups and occupations. Users of 35–54 age group found Salespoint less satisfactory (the mean scores were

below 2.90) than the users who fall into the other age groups (mean scores were just above 3.00). This result indicates that the 35–54 age group users have higher expectations from Salespoint.

Similarly, sales managers and the ‘other’ category users found Salespoint less satisfactory (the mean score was below 2.90) than the other occupations such as sales representatives, marketing and sales assistants (the mean score just above 3.00).

In terms of behavioural loyalty, respondents did not have strong feelings for recommending Salespoint, as the mean scores (2.94, s.d. 1.14) were below the acceptable threshold.

QUALITY OF SALESPPOINT: COMPARISON ACROSS OCCUPATIONS

From Table 14, evaluations of the key aspects of Salespoint differ across user categories. Area managers found the following three aspects, quality of documentation (mean = 3.4); loading/connection time (mean = 3.3) and usefulness of marketing databases search (mean = 3.2), as being acceptable. On the other hand, marketing managers rated the following three aspects from good to acceptable: clarity of directions and guidelines (mean = 3.9); user friendliness (mean = 3.8) and loading/connection time (mean = 3.3). Sales managers and sales representatives identified the same three key aspects very good: user friendliness; clarity of directions and guidelines, and usefulness of the bulletin board. Finally, marketing and sales assistants rated usefulness of the bulletin board (mean = 4.1); degree of customisation (mean = 4.00); and clarity of directions and

guidelines (mean = 3.93) as very good. Clearly, these findings indicate different users have different expectations as to what Salespoint can do for them.

MANAGING USER SATISFACTION: IMPORTANCE AND PERFORMANCE ANALYSIS

This section aims to identify key factors for managing users' satisfaction.

Table 15 shows the most important Salespoint attributes that effect users' satisfaction.

Table 15: Importance and performance analysis by all attributes: overall satisfaction

	All attributes	Importance (Beta) (%)	Performance (Mean)
1	Usefulness of marketing database search	50	3.20
2	Ease of navigation	28	3.10
3	Usefulness of the statistics function	22	3.06

Table 14: Quality of Salespoint: comparison across occupations

	Area manager	Marketing manager	Sales manager	Sales representative	Marketing and sales assistant
	Mean	Mean	Mean	Mean	Mean
1. Quality of documentation	3.40	3.20	3.11	2.92	3.30
2. Loading/connection time	3.30	3.75	2.83	3.34	3.62
3. Usefulness of marketing database search	3.20	3.10	2.67	2.80	3.00
4. Responsiveness of support service	3.00	3.67	3.09	3.14	3.85
5. Accessibility to popular software programmes	3.00	3.36	3.05	3.16	3.50
6. Customer profiling	3.00	3.42	3.25	3.05	3.58
7. User friendliness	3.00	3.80	3.63	3.55	3.78
8. Clarity of directions and guidelines	3.00	3.90	3.55	3.58	3.93
9. Ease of obtaining information about customers and sales	2.90	3.09	3.22	2.94	3.43
10. Usefulness of the bulletin board	2.80	3.17	3.55	3.43	4.10
11. Ease of searching customer database	2.80	2.91	2.91	3.04	3.70
12. Attractiveness of layout and graphic style	2.70	3.50	3.17	3.17	3.44
13. Degree of customisation	2.70	3.18	3.10	3.28	4.00
14. Reliability of the system	2.60	3.25	2.52	3.09	3.80
15. Usefulness of the statistics function	2.60	3.33	2.91	3.04	3.80
16. Ease of navigation	2.30	3.36	2.65	2.80	3.38

From Table 15, users found usefulness of marketing database (beta = 50 per cent), ease of navigation (beta = 28 per cent) and usefulness of the statistics functions (beta = 22 per cent) as the most important aspects of Salespoint to have an impact on their satisfaction. In terms of actual performance, the aspects of Salespoint have been evaluated as acceptable, with reliability of the usefulness of marketing database search first (mean = 3.20), followed by ease of navigation (mean = 3.10) and usefulness of the statistics functions (mean = 3.06). Diagrammatically, this can be presented as follows in Figure 11.

The above diagram suggests that if the quality of the three Salespoint attributes is improved, it is likely that the current user satisfaction with Salespoint will increase.

Further analyses were performed to identify how to improve each of the three attributes. Table 16 shows the aspects of Salespoint, in order of importance that can lead to an improvement in marketing database search.

From Table 16, in terms of key aspects of Salespoint that will lead to an improvement in the perceived usefulness of the marketing database search, clarity of directions and guidelines had the highest share of beta

values (31 per cent), followed by quality of documentation (beta = 29 per cent), ease of searching customer database (beta = 21 per cent) and customer profiling (beta = 19 per cent). In terms of actual performance, the order is different. For example, ease of searching customer database is acceptable (mean = 3.33). This was followed by customer profiling (mean = 3.26), quality of documentation (mean = 3.21 per cent) and clarity of directions and guidelines (mean = 3.10). Diagrammatically, this can be presented as follows in Figure 12.

The above diagram reveals that if the current performances of these three attributes of Salespoint are improved, it is likely that usefulness marketing database search will get better.

Table 16: Importance and performance analysis by all attributes: marketing database search

All attributes		Importance (Beta) (%)	Performance (Mean)
1	Clarity of directions and guidelines	31	3.10
2	Quality of documentation	29	3.21
3	Ease of searching customer database	21	3.33
4	Customer profiling	19	3.26

Figure 11: Attributes of users' satisfaction with Salespoint

Figure 12: Improving usefulness of marketing database search

Ease of navigation

Table 17 shows the antecedents of ease of navigation.

From Table 17, in terms of key aspects of Salespoint that will lead to an improvement in ease of navigation, degree of customisation had the highest share of beta values (36 per cent), followed by ease of obtaining information about customers and sales (beta=35 per cent), clarity of directions and guidelines (beta=18 per cent) and usefulness of the bulleting board (beta=11 per cent).

In terms of actual performance, the order is different with ease of obtaining information about customers and sales as first (mean=3.29), followed by clarity of directions and guidelines (mean=3.10), usefulness of the bulletin board (mean=2.91) and degree of customisation (mean=2.90). As can be seen from the performance measures, the existing level of customisation is not satisfactory from the users' point of view. Figure 13 shows how ease of navigation can be improved.

The above findings suggest that if the quality of the four Salespoint attributes is

Table 17: Importance and performance analysis by all attributes: ease of navigation

	All attributes	Importance (Beta) (%)	Performance (Mean)
1	Degree of customisation	36	2.90
2	Ease of obtaining information about customers and sales	35	3.29
3	Clarity of directions and guidelines	18	3.10
4	Usefulness of the bulletin board	11	2.91

improved, it is likely that these improvements will have positive impacts on ease of navigation with Salespoint.

Usefulness of the statistics function

From Table 18, in terms of key aspects of Salespoint that will lead to an improvement in the perceived usefulness of the statistics function, quality of documentation had the highest share of beta values (56 per cent), followed by usefulness of the bulletin

Figure 13: Improving ease of navigation

Table 18: Importance and performance analysis by all attributes: usefulness of the statistics function

	All attributes	Importance (Beta) (%)	Performance (Mean)
1	Quality of documentation	56	3.21
2	Usefulness of the bulletin board	44	2.91

board (beta = 44 per cent). In terms of actual performance, the same order can be found with quality of documentation first (mean = 3.21), followed by usefulness of the Bulletin Board (mean = 2.91). The latter attribute of Salespoint was not satisfactory from the users' point of view. Figure 14 shows how usefulness of the statistics function can be improved.

The above diagram illustrates that if the quality of the two Salespoint attributes is improved, it is likely that perceived usefulness of marketing database will get better.

Table 19: Importance and performance analysis by all attributes: intention to recommend

	All attributes	Importance (Beta) (%)	Performance (Mean)
1	Usefulness of marketing database search	39	3.20
2	Ease of navigation	34	3.10
3	Degree of customization	27	2.90

MANAGING USER LOYALTY: INTENTION TO RECOMMEND AND PERFORMANCE

Table 19 shows the main Salespoint attributes that affect users' intention to recommend Salespoint.

From Table 19, users found usefulness of marketing database (beta = 39 per cent), ease of navigation (beta = 34 per cent) and degree of customisation (beta = 27 per cent) as the most important aspects of Salespoint to have an impact on their recommendation. In terms of actual performance, the same order can be

Figure 14: Improving usefulness of marketing database search

Figure 15: Improving user loyalty

identified, with usefulness of marketing database first (mean = 3.20), followed by ease of navigation (mean = 3.10) and degree of customisation (mean = 2.90). Although the first two attributes are satisfactory, the degree of customisation was poor from the users' point of view. Figure 15 shows how intention to recommend can be improved.

The above diagram suggests that if the quality of the three Salespoint attributes is improved, it is likely that users will have higher intention to recommend Salespoint.

Degree of customisation

Table 20 shows the key attributes that affect degree of customisation.

From Table 20, in terms of the key aspects of Salespoint that will lead to an

improvement in perceived degree of customisation, ease of obtaining information about customers and sales have the highest share of beta values (30 per cent), followed by ease of searching customer database (beta = 29 per cent), responsiveness of support service (beta = 23 per cent) and accessibility of popular software programmes (beta = 18 per cent). In terms of actual performance, the order differs with responsiveness of support service first (mean = 3.65) followed by ease of searching customer database (mean = 3.33), ease of obtaining information about customers and sales (mean = 3.29) and accessibility to popular software programmes (mean = 3.26). Figure 16 shows how degree of customisation can be improved.

Table 20: Importance and performance analysis by all attributes: degree of customisation

	All attributes	Importance (Beta) (%)	Performance (Mean)
1	Ease of obtaining information about customers and sales.	30	3.29
2	Ease of searching customer database.	29	3.33
3	Responsiveness of support service	23	3.65
4	Accessibility to popular software programmes	18	3.26

Table 21: Level of competence with software and technology

Software and technology	N	Mean	s.d.	Competence score (%)
Technology in general (eg internet, e-mail)	152	4.13	0.79	96
Other software packages (eg Microsoft Applications)	152	3.99	0.86	80
Salespoint	153	3.46	0.79	50
Portable devices (eg Pocket PC, PDA, XDA)	153	3.31	0.98	43

Figure 16: Improving degree of customisation

The above diagram illustrates that if the quality of the four Salespoint attributes is improved, it is likely that perceived customisation of Salespoint will get better.

USER EXPERIENCE WITH TECHNOLOGY

Respondents were asked to rate their perceived level of competence with Salespoint and use of technology in general.

Table 21 summarises respondents' level of competence with software and technology.

From Table 21, overall, respondents revealed that they are competent with software and technology with mean scores ranging from 3.31 to 4.13. Respondents were, however, more competent at using internet and e-mails (mean=4.13; s.d.=0.79) and least competent at using portable devices such as Pocket PC, PDA and XDA (mean=3.31; s.d.=0.98). User competence at using

Table 22: Demographics of the respondents who feel competent and incompetent in using Salespoint

User character-istics	Incompetent users (n=76) (%)	Competent users (n=76) (%)
<i>Age</i>		
16–24	3	6
25–34	28	32
35–44	45	35
45–54	17	21
55–64	6	6
Over 64	1	—
Total	100	100
<i>Occupation</i>		
Area manager	8	5
Marketing manager	5	11
Sales manager	18	13
Sales representatives	30	42
Marketing/sales assistant	10	9
Others	29	20
Total	100	100
<i>Company</i>		
Company A	6	1
Company B	0	1
Company C	43	23
Company D	7	11
Company E	1	3
Company F	—	11
Company G	43	50
Total	100	100
<i>Log on in a typical week</i>		
Never	25	4
Once a week	32	22
Twice A week	7	13
3 to 4 times a week	13	17
5 times a week	14	23
More than 5 times a week	9	21
Total	100	100

Salespoint was comparatively lower at a mean score of 3.46 (s.d.=0.79). Further analyses were carried out to identify the profile of competent and incompetent users of Salespoint. Table 22 shows demographics of the competent and incompetent users of Salespoint.

From Table 22, in terms of occupation, incompetent users were mainly sales representatives with 30 per cent. Company C, Company G had the highest proportion of incompetent users (43 per cent) followed by a small proportion of Company D employees (7 per cent).

Competent users were mostly (35 per cent) between the 35 and 44 age groups. A high proportion (50 per cent) of competent users was from Company G and was mostly sales representatives (42 per cent).

TRAINING

Salespoint users were asked whether they had received any formal training.

From Figure 17, 58 per cent of respondents revealed that they have received formal training to use Salespoint effectively while 42 per cent pointed out that they have not undergone any formal training. Further analyses were carried out to understand the profile of respondents who have not received formal training. Table 23 shows characteristics of users who have not received formal training.

From Table 23, untrained users were mostly (44 per cent) in the 35–44 age group and from Company C (40 per cent). Majority of them were sales representatives (40 per cent), ‘others’ (28 per cent) and sales managers (19 per cent). Interestingly, most of the untrained users (36 per cent) log on Salespoint at least once a week.

Training requirements

Figure 18 shows Salespoint users’ training requirements.

From Figure 18, the majority of respondents (68 per cent) reveal that they do not require more training to use Salespoint effectively, while 32 per cent would like more training. Further analyses were carried out to better understand the profile of the users requiring more training. Table 24 shows characteristics of the users who require more training.

As can be seen from Table 24, the users who require more training were mostly (44 per cent) in the 35–44 age group and from Company C (40 per cent) and Company G (40 per cent). Majority of these users were sales representatives (40 per cent) and sales managers (25 per cent). Interestingly, most of the untrained users (34 per cent) log on Salespoint at least once a week.

Table 23: Characteristics of users who have not received formal training

User characteristics	Users who have not received formal training (n=64) (%)
<i>Age</i>	
16–24	—
25–34	33
35–44	44
45–54	19
55–64	5
Over 64	—
Total	100
<i>Occupation</i>	
Area manager	6
Marketing manager	6
Sales manager	19
Sales representatives	30
Marketing/sales assistant	11
Others	28
Total	100
<i>Company</i>	
Company A	1
Company B	1
Company C	45
Company D	—
Company E	3
Company F	—
Company G	45
Total	100
<i>Log on in a typical week</i>	
Never	17
Once a week	36
Twice a week	13
3 to 4 times a week	10
5 times a week	10
More than 5 times a week	14
Total	100

Table 24: Characteristics of users who require more training

User characteristics	Percentage of users required training (n=48)
<i>Age</i>	
16–24	4
25–34	27
35–44	46
45–54	15
55–64	8
Over 64	—
Total	100
<i>Occupation</i>	
Area manager	6
Marketing manager	6
Sales manager	25
Sales representatives	40
Marketing/sales assistant	8
Others	15
Total	100
<i>Company</i>	
Company A	8
Company B	2
Company C	40
Company D	6
Company E	—
Company F	4
Company G	40
Total	100
<i>Log on in a typical week</i>	
None	10
Once a week	34
Twice a week	7
3 to 4 times a week	15
5 times a week	17
More than 5 times a week	17
Total	100

Figure 17: Formal training on Salespoint (n=153)

Figure 18: Number of respondents requiring more training (n=151)

QUALITATIVE COMMENTS

Most useful aspects of Salespoint by company

COMPANY G

Accessing the Sales Pipeline Creating specific customer categories for mailings
 As a database for all customers
 Call list and the prospect list
 Contact Information
 Contact map facility, just saves cutting and pasting the postcode to multimap — a feature that really made life easier
 Creating call lists and strategies according to product interest

Customer information
 Database
 Ease of finding contacts from multiple options of searches
 Ease of use
 Emailing campaign
 Fast reporting, getting customer info fast
 Follow-up sales leads, sales process
 Forecasting and prospect searches
 It is easy to navigate in the system and it is easy to find what we are looking for
 Logging of customer history
 Mailing list
 Making offers, letters etc. Also searching CRM database
 Prospect list generation
 Qualification of the customer
 Reporting, customer information
 Search for contacts/companies | Search for sales leads
 Search of customers and companies
 Searching contacts, uploading and downloading of quotation and events
 Searching for companies and contacts
 Search Database
 Simplicity. Easy to learn
 The call lists. To keep all info at one place. | Could have been an excellent tool if I knew that all the sales reps were using it to write in all their info. Now I have to check Sp and then double check with the sales reps.
 The customer base
 The search possibilities
 To be a customer database
 To sort out information about which instruments customers use
 To use it as CRM, sales opportunities, look up
 To work offline
 When you need to find contact information.

COMPANY C

One focal point for customer information and selling processes
 Only for new contacts and more opportunity of internal grow for more customers news
 The fact that it reminds me to make calls

The feedback on the costumer automatic following up date — reply
 The follow-up of the contacts to record in the base
 The possibility to have a global marketing database where all contacts and leads can be stored and managed on a daily basis
 The research on the lead or contact databases.
 The reassignment process. The control of lead tracking by my sales colleagues
 The view of customer and prospect contact details for marketing efforts
 Tracking of actions towards the customers | customer service from your side
 Useful for new opportunities
 Web-based services for the Partners
 Modern managing for the customer
 Majority of the site apart from finding lead numbers
 Database request
 Customer information, product details, presentation tools etc
 Customer Datasheet Lead generation
 Customer Database
 Concrete sales leads to follow up
 Common information and customer database
 Access from any computer with internet access.

COMPANY D

All information is on one screen
 Been able to see if the representative has been out to the customer and what they have discussed, and if I could follow up on it
 Customer account info easy to find, once you know your way round Salespoint
 Data and contacts
 Reporting
 Simple to use — simple navigation
 Speed of connection. Also the fact that it is 'real-time' information
 Tells you how much each customer in your area has spent each month/year and also if they are meeting their sales targets!
 The response time to any queries or questions is extremely good.

COMPANY F

Contact management, appointment management and pipeline
Quick overview about actual customer status
The immediate access to all kind of information about my clients and the clients of my colleagues (eg if they are absent) | — Reminds me of all calls and actions with all the needed information
Web-based.

COMPANY A

Adding notes, and good marketing response
Keeping notes on the customer accounts.

COMPANY B

To have the maximum details of the customer, if the customer answers all the questions.

COMPANY E

Searching database — more flexible than my in-house database.

Constructive comments on how to improve Salespoint: Responses by company

COMPANY G

Ability to search in departments at a specific customer. Ability to group all contacts in depths. In a list for overview and for editing (eg if name changes)
Better graphical reporting
Can you provide an offline client?
Clear guidelines who can enter new customers or change information on existing customers
Full text search necessary
Improvement to do: that everybody (Sales, Customer Care, Service) can use SalesPoint
It would be nice if it was possible to use SO in an offline mode just to check a telephone number or an address when you are on the road

It would be useful to have more uniformity in the data entries (eg all telephone numbers are stored in the same way so it's easier to search on telephone number). | Detailed and complete information on customers installed base added to the database (very useful to search for a list of customers who have a specific kind of instrument/application/accessory/etc)

More information when passing on leads
More powerful editing functions, notification of events by mail or interactive synchronisation with outlook calendar, a better definition of database's fields (eg University, I find really unhelpful to have hundreds of contacts in one company, as a University. It will be impossible to profile correctly.

No sense about the products owned, area of interest, etc. More sales-oriented reporting functions. Other major implementations seem to be already planned in Salesforce
Offline version to use in the everyday working with the possibility to merge the info collected by other colleagues

On-palm PC

Please look at it from a sales person's point of view. There are some things that are minor, but make the usefulness to a field-based sales force minimal. I'm sure marketing people love it, but you won't get sensible info in if it is not giving anything back to the field sales person.

Possibility to connect with online sales figures would be great. Possibility to include an installed service database with real serial numbers of the instruments
Salespoint should be released in an offline client version, and should be interactive with Outlook mailing and calendar
Simplified the reports/customer
System could be utilised connected to network and stand alone

To increase the usefulness it would be necessary to be able to search and group customers having the same interests and then via SalesPoint merge the selected customers with the same letter
When searching for an account or name, the result should be better in terms of number of results. Clean Up should be done often

Work offline
Would like to get to leads and alter them quicker.

COMPANY C

Being relatively new into the company, I need to establish how old data are in the database and its reliability — I extracted a report of some 800+ names with over 60 per cent with no e-mail/phone number, etc Give the capability to each sales people to download additional
GYI interface would help me a lot — make a better help function
I probably lack training to get you a good answer
Look at Company C sales process and organisation over the different structures and countries and Adapt Salespoint to our processes
Make it faster and easier to search current enquiries and get rid of Inquiries/sales leads and or unresolved sales leads
Make it intuitive for the user, that way it will be a help for both him and Company C
Pay more attention to the filtering of the data put into it to begin with
Salespoint in Italian language
See question no. 19. I've been working (before this company) for four years as a Sales Director for an American CRM company in the Nordic region. So I got a lot of suggestions for improvement. Feel free to give me call I am in big need of an improved Salespoint
The ability to access the system from anywhere is brilliant and the speed of the system is perfect. However, the entire user *interface is so illogical* and difficult that I use the system as little as possible. At Company C we use the system to track leads we give to our partners all of my five partners complain that the system is very difficult to use. One of the partners is at a point where they would rather do without leads if they have to use Salespoint. We absolutely need to improve the 'amount' field in leads, as many partners enter wrong numbers (ie 1,000 instead of 1 in case of 1,000 sales or offers). Moreover, it would be really useful if also the 'Sale Pending' leads could be

mentioned in the homepage, just as Unresolved leads, so that partners can further update them (transforming them into 'Sold', 'Bought Other' or any other Result Code that actually closes the lead, otherwise all Sale Pending leads are open leads that will never be updated)
We need more contacts each week not each month
We need to discuss with Marketpoint the way leads are allocated, particularly those leads which are not on anyone's nominated account list and which seem to go straight to 2-tier distribution irrespective of their size
When you post a new lead on Salespoint, it would be nice to inform me via email.

COMPANY D

Link up to Microsoft Outlook
Make it more user friendly for the older members of staff who are not quite competent with new technology
The system seems to work without fail each time, the response time is great and the customer service is at a high level also. However, the system seems to be extremely sensitive when doing searches on customer accounts and the search fields have to be set to all areas of all clients etc.

COMPANY F

Hold information at company level as some information may be relevant to more than just one contact and the contact may go away. Also, relationship mapping between companies partnering is not very good. I really appreciate Salespoint as a working tool
Statistics for every user about his very own Sales performance (ie how many calls per day by phone, meetings etc)
Which documents and information are worth to share/upload into Salespoint.

COMPANY A

Needs to link into our accounts and systems to get more accurate reports on what customers are buying or have bought

The introductory training was very generic and not related to how we specifically use Salespoint. It would have been better if the functionality was shown with examples of how it could be used in our business.

Least-useful aspects of salespoint: Responses by company

COMPANY G

As a planning tool

Being an online only tool. Salespoint cannot be considered a useful system for a field sales engineer. It simply doubled the need of input data and information, Outlook being used for both e-mailing and connection with Palm Pocket PC

Completely confusing system — sales leads/enquiries — Are they not the same? Always having to enter date ranges for contact searches is particularly annoying

Customer interest areas and instrument base Day-to-day customer planning tool

Easy research of customer in a small area and the link with quote studio

Editing contact as group (in example flagging a group of contact and assign a new address) I don't like doing everything online, every click relates to a hyperlink and I struggle to update lots of information easily, I'd like an offline version — or know how to upload CSV files.

I find it very difficult to locate using the specified lead number. It would be very useful if there was a button which you are able to put the lead number into
I have a couple of times experienced that my recent typed-in feedback info has disappeared, when I next time locked on to Salespoint

I wanted some reports that were not available It can be utilized only by network connection and not stand alone

It is dependent on the end user to keep the details up to date so the contacts and details were not maximised

It is very complicated and time requiring to go to the software

It's only in English. Poor Navigation

Lack of instructions for use by company users — which fields are mandatory — which are optional. Nomenclature, grouping of customers grouping of leads through marcom actions, | definitions of lead — inquiry Linking prospective purchases to individuals. Most cases the purchase will link to a Dept or Group, with several members involved in the decision

Mapping of the cmrs (too many names for a specific cmr exist)

Marketing tool, too often customer data are not correct due to the fact that too many people can alter this information

Media

More navigation

Must have a fast communication to use it; not available offline

New to Salespoint

Not being able to access or update the service on the road

Online, very slow, to open too much sides for one cmr

Profiling customer is too complicated

Quality of leads supplied in Middle East & Africa geography is extremely poor, primarily a European-based tool and in the most case irrelevant in terms of use and impact within our countries.

Reporting

Reports and statistics, which are not very useful and could be improved

Search is bad, email listings, flexibility should be better, only access online

Searching for full text keywords is not possible

Stand alone system lack of relevant data; for a start, get it synchronized with contacts and calendar in MS Outlook

Statistics

Statistics

Takes a lot of time to go to feedback and write in info

The heavy interface use

The choice of sales result where sometimes we are obliged to put some information to validate the feedback, and where sometimes this information is unknown. The refreshing

page system is very low. The access time is sometimes too low. I don't know very well all possibilities of marketing actions. A new advanced training for me is now necessary. In details, user friendly with a lot of screen capture user-guide. The downloading of new contacts or email list Excel database. The content of information should be more detailed.

The fact that I couldn't use it to map the organisation chart of an account was a big drawback, ie I couldn't tell it the reporting relationships between the various contacts. I would have liked to have been able to draw and use interactive org charts.

The fact that we also have at least two other database programs in use (Ad Track and Quote Studio) makes it heavy to establish the routine of using Salespoint. *Our time as sales people is very limited, programs have to be very user friendly, and you have to be able to add info fast, that I think Salespoint lacks.* I actually see no clear reason for using it in my sales work other than as a reporting tool to my management. *So most often I make my own excel sheets, or use excel sheets provided by management.*

Salespoint does not give me a good overview, as a life sciences sales person, I just don't think Salespoint meets the demands I have for a good sales tool. The impossibility to work offline is unacceptable.

The search functions do not always work appropriately, some times it's capital sensitive etc. The simplicity to use it and the obligation to be connected.

The User interface is non-intuitive, and the speed that the user is able to do his work is far too slow.

There is no way to work in a matrix structure — eg share the leads with colleagues for joint activities on a prospect — thus completely useless for me. The biggest problem is that there is no way to use it offline. Sales people should be on the road and have access to their data — you type reports on a plane or in a train. Data quality is not good. No way to use it for mailings in localised versions.

Too complex

Too slow, not customisable to what I want to see, not offline, too many layers, difficult to make useful to sales person.

Unfamiliarity with certain parts of the software meant that it was difficult for me to get certain reports or data back. For example, the customer response to mailings that had taken place.

User friendliness, difficult to use

WE HAVE TO CONNECT TO WORK
WE ARE SEVERAL WITH THE SAME
ACCOUNT, NO POSSIBILITY TO HAVE
TWO SALES REPS ATTRIBUTED TO
THE SAME CUSTOMER

When the call has been made, it's quite difficult to clear the system. Also the lead allocation process is broken. However, this is probably as much to do with our organisation's instructions to Marketpoint as it is to do with the way Marketpoint works.

The usefulness of Salespoint is dependent not only on its functionality but also on the quality of data within it. Since that is very poor (the sales leads entered are of no use to me) this reflects on the usefulness to me of Salespoint overall.

COMPANY C

Completely confusing system — sales leads/enquiries — Are they not the same? Always having to enter date ranges for contact searches is particularly annoying.

Day-to-day customer planning tool.

I find it very difficult to locate using the specified lead number. It would be very useful if there was a button which you are able to put the lead number into.

It's only in English. | Poor Navigation
Media

More navigation

New to Salespoint

None

Quality of leads supplied in Middle East and Africa geography is extremely poor, primarily a European-based tool and in the most

case irrelevant in terms of use and impact within our countries.
 Reports and statistics, which are not very useful and could be improved
 Stand alone system lack of relevant data, for a start get it synchronised with contacts and calendar in MS Outlook
 Statistics
 The heavy interface use
 The choice of sales result where sometimes we are obliged to put some information to validate the feedback, and where sometimes this information is unknown. The refreshing page system is very low. The access time is sometimes too low. I don't know very well all possibilities of marketing actions. A new advanced training for me is now necessary. In details, user friendly with a lot of screen capture user-guide. The downloading of new contacts or email list Excel database
 The content of information should be more detailed
 The User interface is non-intuitive, and the speed that the user is able to do his work, is far to slow
 Too complex
 User friendliness, difficult to use
 When the call has been made, it's quite difficult to clear the system. Also the lead allocation process is broken. However, this is probably as much to do with our organisation's instructions to Marketpoint as it is to do with the way Marketpoint works
 The usefulness of Salespoint is dependent not only on its functionality but also on the quality of data within it. Since that is very poor (the sales leads entered are of no use to me) this reflects on the usefulness to me of Salespoint overall.

COMPANY D

As a maintenance user rather than as a Sales user I never look at the bulletin board
 Bulletin board
 Complicated to use, only working online, too heavy to input customer information etc...
Customer Contacts as a lot of these are incorrect

Having to change user all the time would be better if went straight to the user using it
 Just the questions that I have to ask my customers as they do not really benefit them, there isn't much point in asking them its just a waste of time
 None particularly, there were some teething problems with the accounts and some have not yet been entered onto the system; however, the system is easy to navigate around and information is easily obtained
 Time consuming.

COMPANY F

It is not easy to relate companies (eg Mother co. and its branches) | — It is not useful that we cannot erase a created company: sometimes the same company has been created several times in the system and it would make things ways easier if we could
 Hierarchy of customer and contact sometimes difficult to find out the right order
 I think the pipeline could be much more sophisticated in how it qualifies the chances of winning a new lead
 Not being able to hold information at company level.

COMPANY A

Not being able to search by first and last name, .e trawling through x number of Mike Smith's
 Hard to navigate at times.

COMPANY B

Sometimes the complexity and waste of time to handle Salespoint, due to the ambiguity of some of the customers. Most of the customers just wanted to get the info that they have request directly and no more contact from the Rep. Not useful date research.

CONCLUSIONS

A total of 206 users participated in the survey with the highest response rate from Company G (41 per cent) followed by Company C (36 per cent) and Company D (11 per cent). The majority of respondents (65 per cent) were males and were relatively young with 66 per cent in the 25–44 age categories. In terms of occupation, a high proportion of respondents were sales representatives (34 per cent). Generally, 39 per cent of respondents have been in their current position for over five years and a high proportion (50 per cent) of them have been working in the company for more than four years. In terms of usage, 27 per cent of respondents reveal to log on to Salespoint at least once a week.

Approximately 19 per cent are considered as non-users (never log on a weekly basis) and 31 per cent are considered as heavy users (five or more log on per week).

Company C had the highest proportion of non-users (52 per cent), while Company G had the highest percentage of heavy users (43 per cent). Heavy users were mostly sales representatives (31 per cent) and were relatively young with 35 per cent in the 25–34 age group and 33 per cent in the 35–44 age range. On a daily basis, respondents do not seem to spend much time on Salespoint with 49 per cent revealing to spend less than 15 minutes. Light users (less than 15 minutes) were mostly from Company C (45 per cent) and Company G (35 per cent). On the other hand, heavy users (more than one hour daily) were mostly from Company G (43 per cent) and Company D (28 per cent). Heavy users were mainly sales representatives (39 per cent) and light users were sales managers (23 per cent).

Overall, the survey was useful in terms of understanding existing users' perception of Salespoint. It is expected that findings of the survey will establish benchmarks for Salespoint in the future. More specific

findings and recommendations are discussed below.

Overall performance: Functionality, satisfaction and intention to recommend

Overall, the performance of Salespoint was deemed acceptable from the users' point of view with mean scores ranging from 2.90 to 3.73. Respondents found the system to be reliable (mean = 3.73), the support service to be responsive (mean = 3.65) and loading/connection time to be of good quality (mean = 3.58). On the other hand, a few attributes were considered to be below the acceptable standards. These attributes were usefulness of the statistics function (mean = 3.06), usefulness of the bulletin board (mean = 2.91) and degree of customisation (mean = 2.90).

The evaluations of the key aspects of Salespoint, however, differ across the five user groups. For example, area managers found quality of documentation (mean = 3.4), loading/connection time (mean = 3.3) and usefulness of marketing databases search (mean = 3.2) as being acceptable. On the other hand, sales representatives and sales managers identified different attributes namely user friendliness, clarity of directions and guidelines and usefulness of the bulletin board. *As such, this is an indication that different users have different expectations as to what Salespoint can do for them. More specifically, although Salespoint is mainly designed for sales executives and sales managers, this segment implied that the software is not up to their expectations.*

In terms of overall satisfaction with the software, users were neither satisfied nor dissatisfied with their mean ratings of 3.05 (s.d. = 1.08). Furthermore, in terms of recommending Salespoint in the future, users did not show strong feelings in doing so with a mean score of 2.94 (s.d. = 1.14). Loyalty score for both satisfaction (38 per cent) and intention to recommend

(34 per cent) was far below the minimum threshold level of 60 per cent.

Key user benefits

Respondents were asked to rate their level of agreement on a series of statements relating to how Salespoint has benefited the company in general, its sales/marketing and customer service. Findings suggest that Salespoint has helped companies to keep up-to-date customer contact information (mean = 3.51). Salespoint has also enabled companies to provide sales-related information to its remote staff (3.18). In terms of contribution to sales and marketing, users revealed that Salespoint has reduced the search time for customer information (mean = 3.38), has helped them to identify future sales opportunities (mean = 3.16) and, in general, has improved their work productivity. Finally, in the area of customer service, respondents found that Salespoint has enabled them to increase their efficiency in communicating with their clients (mean = 3.10) and has helped them to achieve better customer care (mean = 3.00). As such, these findings indicate that Salespoint has benefited its users at three different levels: company, sales/marketing and customer service.

Salespoint Pocket PC version

One of the objectives of this survey was to assess the market potential among existing users for the Pocket PC version of Salespoint. Results of this study indicate that a *high proportion of users* (77 per cent) were unaware that Salespoint is available in Pocket PC version. Out of those unaware user groups, the majority of them were from Company G (44 per cent) and Company C (39 per cent). In terms of occupations, the unaware user group were mostly *sales representatives* (33 per cent), *sales managers* (18 per cent) and users whose occupations fall into the 'other' category (28 per cent). Furthermore, respondents were asked about their interest in using

Salespoint Pocket PC version in the near future. The survey results were promising as a significant proportion of respondents (32 per cent) showed some interest. For the small group of interested users, however, their profile reveals that they were relatively young: 28 per cent in the age group 25–34, 42 per cent for the 35–44 and 25 per cent for the 45–54 age groups. In terms of occupation, the interested users were mostly sales representatives (40 per cent) and sales managers (20 per cent). Two companies share the highest proportion of interested users: Company C (40 per cent) and Company G (40 per cent). Respondents were also asked about their interests in accessing Salespoint contacts via a mobile phone. Again, a small proportion (35 per cent) reveals such an interest. Interested users in accessing Salespoint contacts via mobile phone were mainly sales representatives (49 per cent) and sales managers (21 per cent) and were mostly from Company G (53 per cent) and Company C (30 per cent).

Training requirements

In terms of training, only 58 per cent of respondents revealed that they have received formal training on using Salespoint. Out of those users who have not been trained formally, 44 per cent were in the 35–44 age groups and were from Company C (45 per cent). The majority of them were sales representatives (30 per cent) and sales managers (19 per cent). Respondents were further asked if they would like more training and a small proportion (32 per cent) felt that more training would assist them in using Salespoint effectively. In terms of profile, they were mostly sales representatives (40 per cent) and sales managers (25 per cent) from Company C (40 per cent) and Company G (40 per cent). Overall, in terms of competence with using Salespoint, only 50 per cent of current users feel competent enough as compared to 96 per cent being competent at using email

and internet. It should be noted that only 43 per cent of respondents consider themselves competent at using portable devices.

RECOMMENDATIONS

Drawing from the conclusions of the survey findings and given the increasing competition from other companies (eg Salesforce.com, Maximizer), *it is recommended that Marketpoint should continue to improve the functionality of Salespoint to the best of its potential in order to maintain its competitiveness.* To do that it is suggested that an internal product development team is formed. The team structure should include a project manager, IT technicians, a marketing assistant and account managers.

Based on the survey findings, as a matter of priority, the team should focus on the following attributes of Salespoint:

- Usefulness of marketing database search
- Ease of navigation
- Quality of documentation
- Clarity of directions and guidelines
- Usefulness of statistics functions.

The survey has shown that an improvement in the above areas will lead to greater satisfaction and recommendation levels from the existing users. Also, in line with improving functionality of the software, *Marketpoint could carry some interviews to better understand the needs of Sales Representatives and sales managers across its existing client companies.*

Furthermore, in terms of users' overall satisfaction with Salespoint, the index achieved from this survey was 3.05 (measured on a five-point scale with 1 = Very Dissatisfied and 5 = Very Satisfied). It is suggested that after improving the product functionality of Salespoint, as identified in this report, *a follow-up study is carried out to monitor performance improvement.* The benchmark index for overall satisfaction is set to 3.05. In subsequent surveys, any

increase above 3.05 will be qualified as improvement and any decrease considered as problematic. Also, at the individual level, the Surrey research team suggests that to be able to cope with increasing competition in the market, *Marketpoint should target a minimum performance score of 3.40 or 60 per cent loyalty score in all attributes of Salespoint in the near future.*

Market potential for Pocket PC version of Salespoint

The survey findings reveal that a high proportion of existing users were not aware that Salespoint is available in a Pocket PC version. Unaware users were mostly sales representatives and sales managers from Company C and Company G. As such, it is recommended that awareness campaigns should start first to target these groups. New awareness tactics (eg, newsletters, price promotions etc) should be applied on a regular basis. *The opinion of the decision makers in Company C and Company G should be investigated as to how awareness can be improved.* One possible tactic would be to give PDAs (with Pocket PC version of Salespoint) as a free trial on a pilot basis to the key decision makers (sales managers, area managers) in Company C. It is widely believed that in terms of technology acceptance, trial leads to better adoption.

Training

The survey findings highlighted that training was a fundamental issue for existing users and was further supported by respondents' qualitative comments. *Although the initial training is considered to be very useful, the survey results indicate that users need more advanced training in areas such as reporting.* Furthermore, *the findings clearly indicate that different user segments have different expectations and thus training needs.* Apart from providing basic training when a company first adheres to Salespoint, further (advanced) training can be provided depending on the client needs. Companies that require further

training should be charged at a different rate. Marketpoint can even issue certificates attesting users' capabilities and knowledge at using Salespoint. Furthermore, *it is recommended that Marketpoint (1) carry an in-depth training needs analysis with its current users (both light and heavy users); (2) design and implement a training evaluation survey; (3) design and implement follow-up training.*

Marketing of salespoint

The findings of this study, based on the three highly rated attributes, can be used to

revise Salespoint's core selling proposition. In essence, Salespoint can be marketed as *a reliable system with fast loading/connection time and as having an excellent customer service.* Furthermore, Salespoint should build communication messages (eg brochures, corporate presentations) around the key user benefits as identified in this study. For instance, communication should emphasise that Salespoint can help a company to keep up-to-date customer contact information or it can even reduce the search time for customer information.