



Secrets from an ERP Salesperson: “Listen to What the Sales Guy Says”

By Ed Bonaski, Sherwood Systems

Does that comment make you want to cringe? Do your own experiences with salespeople, along with the cliché stereotypes, make you wary and distrustful of them? In speaking with the salesperson about their products and your requirements, can you trust them? Or are they just saying what they need to say in order to move you along in the sales process?

Drawing Out Details to Find the Best ERP Solution

Sometimes, but on the contrary, many salespeople are skilled in asking you questions that can help draw out important information. Your current pains with the existing system – as well as your vision for your organization - are important to know in order to determine the tools you will need to accomplish your goals.

In addition to knowing your goals, we also need to know your budget for a solution. A typical sticking point with prospects is not disclosing the budget or saying that they don't have a budget. Prospects may feel the salesperson will take advantage of this information and estimate on the high end in the proposal.

Our proposed solution is based on the information uncovered in the initial discovery meeting. Knowing your budget is really about making sure that this solution, no matter how dead-on, is financially reasonable. We know you are busy and we don't want to waste your time with an unrealistic proposal. If the solution is way outside of your budget, you will find that most salespeople will give you advice on competing products to look at that *are* within your budget.

How to Prepare for That First Call

So, what should you do before you make that first call to the salesperson? Some of the things I suggest are fairly obvious and some are not.

1. **Do Your Research.** Do an internet search for reviews on the software you are considering. I'm sure you already do that for those flat screen TVs, laptops, cars, etc. There is a tremendous amount of information out there on the products available to businesses. It is a disservice to you to not take advantage of it.
2. **Visit The Company's Web Site.** Read the white papers and visit the links on the site. If an organization is noted in a white paper or if the company lists their clients on their website, make a call. I can't guarantee the clients will be receptive to talk to you about the company, but it's worth a shot. Of course, always be respectful of people's time.
3. **Ask Your Suppliers What Software Applications They Use.** That type of feedback is invaluable. You already have a relationship with them - ask what system they use for financials, distribution, etc.

4. **Limit the Number of ERP Systems Considered.** I've run into organizations that will evaluate up to 10 different packages! That's a hard process to manage and to keep track of the nuanced differences between each one. I recommend you limit your search to no more than 4.
5. **Don't Just Focus On Features And Functionality.** Let's face it; if you are looking for an ERP package all of the competing products handle GL, receivables, and payables in an efficient manner. The same can be said for order processing and other customer-related activities. I'm not suggesting that you ignore functionality, but also focus on the software company. How stable are they? Will they be around for the long term? How much do they invest in R&D? How often are there new releases?
6. **Create A Needs Document.** I find that a number of organizations either do not have a written document of requirements or it was slapped together without any input from key people. I'm not saying that you should create a formal RFP, but having a requirements check list will help you keep on track with your discussions with the salesperson. Sharing that document with the salesperson is also very valuable since it helps with understanding your needs and opens the door to greater discovery.

Make Your Goals Crystal Clear

The vendor understands that selecting a new software package is a *bet-your-business decision*. The vendor's goal is to implement a system that exceeds your requirements and expected business outcomes. Therefore, these goals must be crystal clear in the minds of both the customer and the vendor.

Getting there requires an open dialogue. If the job is done correctly, go-live day becomes a non-event and you will begin to reap the rewards of a system that addresses your specific business requirements immediately.



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As Account Executive at Sherwood Systems, Ed loves working with new industries. A 12-year veteran of the software sales industry, he prides himself on his well-honed ability to understand a client's needs and develop a vision that helps them achieve their goals.

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