



:: SERVICESOURCE, INC.

KNOWLEDGE TRANSFER

A global service provider uses Mindjet® MindManager® to create a consistent yet flexible sales process.

For ServiceSource, the leader in Service Performance Management, one of the key drivers of success is being able to quickly establish a high degree of trust with its prospective clients, which include some of the largest technology companies in the world. After all, as part of its work selling service contracts, ServiceSource needs to access its clients' most valuable asset—their customers. ServiceSource has found that it can win trust more quickly with its comprehensive, consistent client engagement process; more efficiently transfer client information over to its sales team; and train new sales representatives more effectively – all by using Mindjet MindManager to create a seamless, flexible service contract sales process.

BUILDING CLIENT TRUST

"There's some natural trepidation at first on the part of a prospective client," says ServiceSource senior vice president of worldwide operations, Dave Dunlap. "They ask themselves, 'Are we really going to give this company information about our customers? Will they present our service offerings as well as we can?' But when we present clients with the MindManager documents that visually map out how we will manage their account, they say 'You guys are really buttoned up. We made a good choice.'"

Dunlap says that the process of winning trust begins with the first client engagement session. In these meetings, ServiceSource's implementation services group will sit down with the client representatives and open up the MindManager map that serves as a template for its engagement process.

"We use a standard map we've developed to capture key client information such as pricing, objection handling, organizational structure, key customer contacts and commission

fees," Dunlap says. "In one visual document, we capture everything our inside sales people will need to effectively represent our client to its customers."

The map serves as a kind of portal into the engagement process, listing and linking to any number of document types ServiceSource has received from the client, as well as information still needed. By the completion of the engagement process, ServiceSource has one single document that provides an overview that concisely demonstrates its understanding of the client's offerings, how it will present those offerings to the market, and all the information its sales team will need to make the sale.

"The biggest benefit for us," Dunlap says, "is that MindManager has enabled us to consistently apply our sales process across global client teams. The end result is a process that can be continually perfected to help us deliver the highest quality service possible to our clients"

That's not to say that ServiceSource treats every client the same. "What's so unique about the MindManager product," he says, "is that we can capture all critical client information in a standard template. But if we find that the client needs something outside of our standard process, we can just add another branch to the map. MindManager gives us a template to standardize our sales process—but then makes it very easy for us to customize the template to the needs of individual clients."

STREAMLINING KNOWLEDGE TRANSFER

A second benefit of mapping comes when ServiceSource's implementation services group passes client information on to its inside sales team. Grant Clarke, ServiceSource senior account manager, says MindManager has completely transformed what was once a haphazard knowledge transfer process that typically stretched over a period of weeks.

"In the past, we had a shared drive with gigabytes of random documents spread across different folders. Client information



ServiceSource uses MindManager maps, like this example, to visually show clients how they'll manage their accounts.

wasn't easy for sales reps to get their hands on. And when they did, it wasn't easy to understand how different pieces of information related to each other."

Now, he says, each time ServiceSource wins a new piece of business, inside sales teams get a single, easy-to-read and easy-to-navigate MindManager map that visually captures and connects all the information they'll need to start selling.

ServiceSource began using maps as the backbone of its sales process about a year ago, says Dunlap. "In that short time, MindManager has helped us dramatically reduce the time from when a client says, 'Yes, we want to do business with you,' to when our sales people are on the phones actually selling service contracts and generating revenue for that client."

Using the maps as central repositories for client information also enables ServiceSource to make sure all members of dispersed global teams have instant access to the same updated client information.

"In most organizations, information typically gets shared as a result of a kind of 'waterfall effect,'" Clarke says, "where one person learns something new, tells it the person next to them, who then tells it another person, and so on. We train members of the global account teams to always put new information in the account map. Everyone connected to that account can instantaneously access all current client information without having to wait for their coworkers to pass information along."

Clarke says this immediate sharing of information is critical to ServiceSource's success. "If a client felt like they had to keep repeating the same information to different members of the sales team, they'd start to lose confidence in our sales model."

RAMPING UP THE RAMP UP

A third benefit comes when ServiceSource hires new sales representatives.

A perennial challenge for account managers had been the time it took to bring a new sales rep up to speed first on the company's sales process, and then on the particulars of a new client's offerings. Again, MindManager has helped ServiceSource save valuable time.

Senior account manager Clarke says that when he joined ServiceSource more than a year ago, his primary challenge was to make new sales reps self-sufficient as soon as possible. He knew that if he could improve the training process, he would help ServiceSource win in two ways: new employees would become productive more quickly; and improving the process would reduce the stress of more senior sales reps, who were spending valuable selling time training their new colleagues.

Clarke, who introduced MindManager to ServiceSource, says it soon became apparent that new hires who trained with account teams using maps came up to speed much more quickly than others.

"We observed that when a new rep interacted with the maps from day one, their development was accelerated. We started seeing them become more self-sufficient as they quickly learned where to go to answer their own questions regarding simple account operations—because the answers were there for them in the maps. They were asking fewer questions from senior sales people and when they did ask, the questions were more strategic, allowing them to learn at a more accelerated rate."

Senior VP Dunlap notes that, overall, MindManager has enabled ServiceSource to create a consistent way to manage the sales process, from the first cold call to the heat of selling that client's service products. "The really odd thing is that in classic IT strategy, systems support processes. But MindManager has enabled us to use the system to define the process—and this has made our whole sales process a great deal more efficient."

"When we present clients with the MindManager maps that lay out how we will manage their account, they say 'You guys are really buttoned up. We made a good choice.'"

ROI

Gain new clients' trust more quickly, "dramatically" reduce the time needed to begin selling client offerings, faster ramp up of new sales reps.

Company Profile

ServiceSource is a global outsourced sales organization with offices on three continents and more than 400 sales professionals. By combining proprietary business analytics and diagnostic tools, streamlined sales processes and reporting technologies to create a complete outsourcing solution, ServiceSource maximizes support and services revenues opportunities on behalf of its clientele, made up of the world's largest technology companies.

Challenge

Quickly demonstrate to new clients ServiceSource's ability to execute large projects; efficiently capture, organize and transfer from one global team to another its clients' complex product information; shorten the training time needed to enable new sales professionals to precisely represent its clients before customers.

Solution

ServiceSource uses Mindjet MindManager to capture, share and update complex client interactions and product details.

Product

Mindjet MindManager

Result

ServiceSource is growing rapidly by creating consistent, easily shared visual documents that help it continue to gain new clients and successfully represent client offerings to customers.