



F&G

FUNNEL MECHANICS

**OPERATIONS DIRECTOR
BUYER PERSONA EXAMPLE:
SYSTEMS SUSIE &
SALESFORCE**

WHO WANTS TO SELL TO SUSIE?



Salesforce is an American cloud-based software company headquartered in San Francisco, California.

It exploded onto the CRM scene in the early 2000s, having been set up by a series of ex-Oracle executives including Mark Benioff (the current co-CEO).

It rapidly garnered an apparent reputation for being the best CRM in the world, and the bulk of its revenue still derives from its CRM service. However, it developed far beyond CRM to create the Salesforce Platform, on which an incredible number of applications have been designed which manage pretty much every business process imaginable, from customer service and delivery, to accounts, to marketing automation, analytics, etc.

It employs 35,000 employees worldwide, and in 2018 made 10.48 US\$mill.

So it's a huge software beast... but is it right for our persona Susie?

PERSONA: SYSTEMS SUSIE

SECTION ONE: WHO

BACKGROUND Job, career path	Susie is Director of Operations for her Bristol-based SME, having worked in Ops for several different organisations already and finally made it to the Head / Director role for her current company. She's helped previous Director bosses she reported into choose and implement new systems, so she's aware of just how much work and complexity is involved, but also how operational efficiency for a business can be transformed by an intuitive, well designed and integrated set of systems. Having started in this new company, she's become very aware of how substandard their overall systems architecture is; there is a legacy bespoke system which cost £100k+ to build but isn't used by half the organisation, and doesn't integrate with any of the (many!) other systems being used, most of the systems do the same thing (duplication of effort alert!), and to top it off lots of people are still using their beloved (and now rather large, complex, and prone-to-breaking) Excel spreadsheets. People across the business are starting to clamour for a better and less technologically-painful way of working, and are looking to new-in-post Susie to come up with the answer. Susie's new company is medium-sized, turning over a couple of million annually and with 30 employees.
DEMOGRAPHICS Identity, age, income, geography, family	Susie is in her late 30s, earns £70,000 a year, and lives in Bristol with her husband and 5 year-old daughter. Working in Ops, she excels in producing detailed completer-finisher work, and ensuring that all business projects are well planned and executed. So she's extremely organised, and always looking to save wherever possible; save money on overheads, save time and effort. She's also very professional and logical, always wanting to do a great job, but she's also very focused on the people in her business and helping them work better, faster, and happier.
IDENTIFIERS Attitudes, communication preferences	Susie is time-poor as she has so many internal stakeholders to liaise with and try and help, especially on the impending systems project. So all comms she receives need to be short and concise. Visually arresting / appealing will help as well. Ultimately she wants to build a long list of potential systems of interest and then start to research them all, including all the testimonials. She will also reach out to her network for word of mouth recommendations and also horror stories.

PERSONA: SYSTEMS SUSIE

SECTION TWO: WHAT

GOALS (rank)	<ol style="list-style-type: none">1. Choose a set of systems (or a platform) which can all integrate with each other and meets a hugely varied and complex set of systems requirements (this list being a significant piece of work in itself!) but to name a few key items: no duplication of effort, high levels of automation, lots of intuition so that process time is massively reduced, something already built and continuously improved (so not bespoke build, something customisable) so there's plenty of support and it's already a proven best practice system, etc. etc.2. By solving 1, impress Susie's new boss, the CEO, and as many of her new colleagues as possible (or certainly those that are the most internally influential) - there's a lot of expectation surrounding her hiring and what she will achieve - especially on the systems front.3. Manage to run this MASSIVE systems project alongside a lot of the rest of the day-to-day running of the business, so not let those Business As Usual (BAU) balls drop.
Challenges (rank)	<ol style="list-style-type: none">1. Cost of the system - a huge fear is how much it will cost (plus in terms of people) to implement a system that can improve business systems automating so many different core business processes and parts of the business, e.g. sales, delivery, accounts, etc.2. Complexity of the project because of all the different systems that will need to be built out, and all the different stakeholders who will need to be involved and sign-off on their respective elements. Which leads to the next challenge...3. Change management, and the fact many people will resist changing to new systems and ways of doing things.4. How to not let this massive project affect BAU ops so that the money keeps coming in.5. The time it will take to identify the right system - there are so many out there, how on earth do we know we're going for the right one?! And then deliver it... and THEN make it work (the process of implementation and embedding will include a lot of bugs and fixes).

<p>QUOTES Real words from the buyer about aspirations, objectives, challenges</p>	<p>“I really want to deliver on this, but I’m secretly really scared about just how huge this project is and how I’m going to get it all done, and done well - without killing us on cost.”</p> <p>“This project could make my reputation, or break my reputation here: there’s a lot riding on it because it involves and affects every part of the business.”</p> <p>“Before I didn’t make all the final decisions, but now I do - so how will I know I’ve made the right one when there are so many different potential systems out there?”</p>
<p>OBJECTIONS Why wouldn’t they buy the product the company is trying to sell them?</p>	<p><u>The product in general:</u></p> <ul style="list-style-type: none">- Failing to meet all the goals, (being many and extremely complex individually and overall in this case), and falling foul of the equally numerous challenges. <p><u>Salesforce’s product in particular:</u></p> <ul style="list-style-type: none">- Salesforce has a nasty reputation for high ongoing subscription costs, and anti-SME price plans which lock companies into prohibitively long contracts. It’s also tempting for SMEs in particular to go with cheaper alternatives, i.e. not use a sledgehammer to crack a nut.- Salesforce says it’s easily customisable, but in reality some (if not a lot) of up-front customisation and development / programming is required to get the most out of the system - it’s become such a large network of systems and apps that that can be overwhelming and possibly overkill, particularly for an SME. Again, sledgehammer anyone?- Salesforce has a reputation for being incredibly pushy on selling, because of aggressive internal sales targets, and also having salespeople who don’t understand the detail and complexity behind the processes its customers are trying to run. Therefore they end up involving associated “partner” suppliers in the sales process to try and understand the detail for the customer, but how does the buyer know the supplier they bring along is the best, as that surely requires an additional procurement process? Altogether it’s a hugely complex product, project, and sale....



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