

## SalesDirect™

Fully digital cloud-based commerce solution and accelerator for B2B and B2B2C.



In the digital mobile era, sales agents and customer increasingly expect a “consumer-grade” user experience in their interactions. This means easy, anytime access to a catalog of a company’s products and services, simplified order placement and management, and timely account and performance information.

The challenge with building such a capability on a traditional sales or customer relationship management platform is that it can take many months, if not years, of configuration, programming, testing, training, deployment, and adoption. Customers won’t wait. Sales agents may muddle through, but how much revenue will be lost and how many customer relationships will suffer in the meantime? It doesn’t have to be this way. Instead, imagine standing up a one-stop solution in a matter of weeks to support your direct and indirect sales agents. Picture a digital catalog and e-commerce solution that’s accessible from virtually any internet-connected device, providing the type of experience your customers are accustomed to and expect.

The wait is over. Let Deloitte show you an entirely new and innovative approach to digital sales and service.

### Introducing SalesDirect

Deloitte’s SalesDirect solution is a plug-and-play, business-to-business (B2B) and B2B-to-consumer (B2B2C) cloud solution, available in SaaS model or a custom build accelerator, that is designed to provide organizations and their customers fast, easy access to:



Personalized sales campaigns, catalog of products, services, and pricing based on sales agent and customer profiles



Customer-centric e-Commerce transactional capabilities



Support for ordering complex product and service bundles



Subscription and account management



Real-time communications and workflow management between sales agents and parent companies



Sales agent centric reporting on sales performance and tracking

Figure 1. Key benefits of SalesDirect

SalesDirect bridges an important gap in legacy customer interaction capabilities, providing sales agents the opportunity to use a variety of inputs, including customer profile and behavior, past product choices, and other information from your enterprise systems, to create a more customized experience for customers. Delivered through a consumer-grade user interface, SalesDirect’s capabilities can help your sales agents in assisting customers with making complex product and service choices.



**Speed to market.** The SalesDirect solution with standard features and capabilities (Figure 2) can be deployed in two to three weeks with concurrent sales rep training for one week. If your needs are more complex and more customization is required, deployment could take longer.

**Flexible terms.** SalesDirect is available through a recurring licensing model that follows opex accounting treatment and can potentially offset the significant development, maintenance, and refresh costs of a custom build. Additionally, SalesDirect clients receive access to Deloitte's intellectual capital, business consulting and technology deployment experience, and timely maintenance and upgrades. Our flexible model provides various options for renewal and cancellation with terms that can be customized for our clients.

**Integration.** SalesDirect can integrate with your organization's in-house systems, including billing, CRM, and ERP systems, potentially enabling a smooth transition and faster market reach. Being a cloud-based solution, it promotes secure data and cyber-risk management, and it is Payment Card Industry Data Security Standard (PCI/DSS) compliant. For business continuity, SalesDirect offers availability and service level agreements (SLAs) for critical service paths. For regulatory compliance purposes, SalesDirect is architected to adhere to mandated data storage requirements across different regions.

**SalesDirect can help deliver value in many ways, including**



SalesDirect can help sales agents order alongside and for the customer – and for customers to order direct. It is designed to accommodate complex buying experiences with an easy-to-use interface to help sales agents stay focused on selling instead of data entry, form completion, faxing and issue resolution.

**Figure 2. SalesDirect facilitates easy product and services configuration and sales**

**Feature-rich, consumer-grade user experience**

Here are some of the benefits of SalesDirect:

- **An order dashboard** that presents an organized view of real-time data, making it easier for sales agents and customers to track orders belonging to various categories.
- **Order placement**, a five-step, automated, hassle-free order-flow process that can increase productivity and reduce inefficiency, end to end.
- **Account information** for managing the subscriptions and renewals for products, services, and software purchased by either the account manager or the customer.
- **Package creation**, a process for selecting products, services, and software based on your customized catalog. The catalog features your latest products and services, along with customized pricing. It is easily configurable to cater to various customer segments and profiles.
- **Shipping and payment**, where users can choose the shipping address and payment method.
- **Order summary**, where users can review and confirm their orders.
- **A collaboration platform** for interaction between sales reps and sales ops teams in headquarters, as well as among sales reps, which includes the exchange of order-related information on-the-go to save time
- **A reporting dashboard** that offers visibility into sales agent activity with real-time data. This helps sales agents reduce time spent on manual processes and facilitates informed decision making across the sales organization

## Deloitte delivers digital

In areas relevant to the SalesDirect solution, Deloitte is recognized as a leading business consulting and digital services provider:

- Deloitte was named the 2017 undisputed worldwide leader in Business Consulting Services based on capability and strategy by IDC<sup>1</sup>
- Deloitte is positioned as a 2016 Vanguard firm and leader in Digital Innovation<sup>2</sup>
- Deloitte was named a 2016 global leader in Digital Innovation Consulting Services based on breadth and depth of capabilities by ALM Intelligence<sup>3</sup>
- Deloitte was named a 2016 global leader in CRM and Customer Experience Services based on completeness of vision and ability to execute by Gartner<sup>4</sup>
- Deloitte was named a 2016 global visionary in IT Services for Communications Service Providers based on strategies and completeness of vision by Gartner<sup>5</sup>



Our SalesDirect solution offers an entirely new approach to sales, service, and order management, especially for large, complex product and service bundles that are common in corporations today. The SalesDirect approach helps simplify and amplify sales enablement, customer experience, and sales lift by addressing information gaps and service barriers that sales teams and customers have faced for many years.

## Contact us:

Learn more about Deloitte's SalesDirect solution.

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<sup>1</sup> Source: IDC MarketScape: Worldwide Business Consulting Services 2017 Vendor Assessment by Cushing Anderson, March 2017, IDC #US41569617

<sup>2</sup> Source: Digital Innovation Consulting, ALM Intelligence.

<sup>3</sup> Source: ALM Intelligence; Digital Innovation Consulting 2016; ALM Intelligence estimates © 2016 ALM Media Properties, LLC. Reproduced under license.

<sup>4</sup> Source: Gartner, Magic Quadrant for CRM and Customer Experience Implementation Services, Worldwide, Patrick J. Sullivan, Ed Thompson, 1 December, 2016.

<sup>5</sup> Source: Gartner, Magic Quadrant for IT Services for Communications Service Providers, Worldwide, Jouni Forsman, Norbert J Scholz, Amresh Nandan, 14 July 2016

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