



## EXECUTIVE SUMMARY

## FOR MEMBERS

## OVERVIEW

## Better Aligning Communications Efforts with Sales

by Jamie Serino, VP Communications for SunGard Financial Systems

**SunGard Financial Systems figured out a better way to support its salesforce through its PR efforts. Here's how they did it.**

**JAMIE SERINO** leads the global communications team responsible for press relations and industry analyst relations, as well as some social media and content development initiatives. SunGard is a global \$4 billion company and one of the world's leading software and technology services companies. It provides software and processing solution for financial services, education and the public sector, as well as disaster recovery services, managed IT services, information availability consulting services and business continuity management software.

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*“By prioritizing, you end up minimizing the white noise.”*

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SunGard went private in 2005 and began restructuring to improve function across the company. The communications department was centralized about two years ago and that allowed it to make the moves it has to align itself with sales, which, along with the technology division, began centralizing about six months later. The board and C Suite provided strong backing, which bought them time and allowed them to make changes in bigger steps.

When it was decentralized, each of the company's division had its own communications office and they sometimes competed with each other for the attention of customers. "The message becomes fragmented out there and that's what we were dealing with."

First, communications did a sales-led effort to provide common messaging. It set up a nine part framework for its sales communications that centered around the three ways it helped its customers, and three messaging groups within each of those categories:

## COMMON MESSAGING

### SunGard FS helps our customers achieve:

#### **AGILE GROWTH THROUGH:**

- Client Service
- New Markets
- Innovation

#### **COMPETITIVE ADVANTAGE THROUGH:**

- Collateral Management
- Regulatory Compliance
- Risk Management

#### **SMARTER OPERATIONS THROUGH:**

- Efficiency
- Data and Analytics
- Services

**SUNGARD** FINANCIAL SYSTEMS

The next step was to figure out how to really help sales, and then demonstrate that that was what they were doing. The PR office had to figure out a way to work together with sales. Change often brings commotion and creates winners and losers. PR intended to minimize the number of losers.

Setting priorities was the first programmatic change. With limited time and resources, PR had to prioritize its efforts to make sure it was focusing on the right initiatives. It began to put rules in places regarding what they could work on and what they could not. It helped that they had the support of leaders on the board, in the C suite and in sales, who were saying the changes were needed. It allowed communications to say they were simply following sales' process.

“By prioritizing you end up minimizing the white noise, which is a great thing to do.” PR stopped making rafts of small announcements and focused on messages that supported sales. Communicatins’ content writers did the same thing. Announcements, blogs and content all started coming together. Sungard was no longer “...yelling and screaming about every little thing.”

To determine sales’ needs, PR stepped up its informal communications with the department and did quick internal online surveys that they made sure were sent out when people would be at their desks. That meant sending them on different days and allowing for different time zones. They got a good response and had to act quickly. Sales moves very fast and PR has to match its pace to be useful.

The next programatic change was to begin using the sales software system. The salesforce was used to using it, and once they appended a document-sharing tool to it, sales people didn’t have to change familiar behaviors to use it.

Many in sales did not understand how they could use media coverage with prospects or customers, so PR began bundling things for them: email templates, articles that could be shared, tweets and the like. Deliberately handing off the materials really helped sales efforts.

PR also turned to problem solving of this sort: win/loss reports from several different sales people in several South American countries indicated prospects and customers there did not know SunGard did a certain thing. PR places a few articles in publications in those countries that dealt with the functionality of the product in question.

The next step was to figure out how to use analyst relations to assist said. PR began sharing industry research from analysts directly with sales, account directors of top customers and people who run sales training. PR also began to talk gather information from analysts rather than just giving them information. That information – including trend information and data on regions the company was thinking about entering -- was passed along to certain sales people. The company also started discussing specific deals with analysts, although they have certain lines they can’t cross.

Serino warned that you have to make sure salespeople are only given the information analysts will allow them to haev. Analysts have strict copyrights and if you violate them you end up on a black list. You can’t give it forbidden material to salespeople and tell them not to use it because they are motivated to share it to make sale. If salespeople will be joining a conversation with an analyst, make sure they are your polished, well-spoken employees.

PR also began measuring those things sales and the C suite thought were important and reporting results. He advises shameless self-promotion and notes that you made need to acquire tools to measure and report on your efforts. At SunGard, PR hooked up with the internal communications people and now has a weekly newsletter devoted to PR.

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The executive summary above was written by staff from watching the presentation and many other ideas were presented. Members may watch the full presentation if wished by logging in.

