

Driving Sales Force Effectiveness



ABSTRACT

Vendors and their customers have specific goals for their businesses and expectations for each other. Unfortunately, they don't always align. In this paper, Michael T. Spellecy of Maritz shares insights and strategies designed to better integrate these goals and expectations by creating lasting partnerships that drive sales. Utilizing real world examples, Spellecy constructs a framework that begins by validating the brand with customers and employees and concludes by examining several best practices for hiring, training, coaching and motivating vendor sales representatives.

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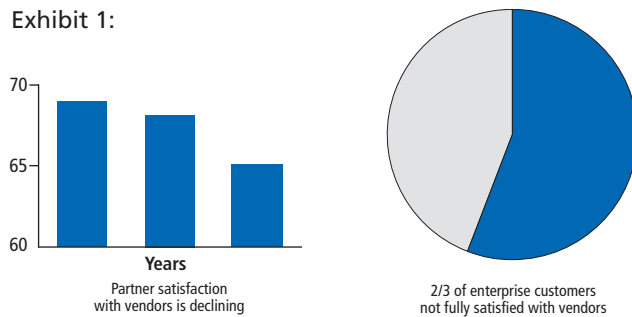


I. The Current State

Vendors and their customers (channel partners or enterprise buyers) rely heavily upon each other for business success. Yet, what should be perceived as a partnership is often rife with conflict. According to recent research, both vendors and their customers have grown increasingly pessimistic about their relationships with each other.

For example, partner satisfaction with vendors has been declining year over year¹ leading a majority of vendors to have concern over strategic alignment with their partners². And enterprise customers are also feeling the pain – with almost 2/3 reporting that they are not fully satisfied with their vendors³ (Exhibit 1).

Exhibit 1:



But, while this trend may appear bleak, it also creates a great opportunity for proactive vendors. By understanding what drives these perceptions and developing an approach that addresses the relationship gaps, vendor sales leaders can better align sales activity to improve both customer satisfaction and loyalty.

II. Business Demands in Conflict

Perhaps the leading causes of these relationship gaps are apparent conflicts in goals between vendors and their customers. Each business desires growth. Yet, institutional priorities often drive decision making. Unfortunately, in many B2B relationships, these priorities often fail to consider the implications that they may have on another entity.

Consider some common goals of the vendor:

Vendor Business	Vendor Goal	Vendor Execution
Manufacturing/ Development	Increasing volume reduces fixed costs per unit and recoups R&D expenses	<ul style="list-style-type: none"> Product push Adoption of new technology
Distribution	Increasing inventory turns reduces likelihood of holding products with declining demand	<ul style="list-style-type: none"> Channel load/unload incentives Enterprise incentives
Service	Post sale consulting and implementation creates new revenue streams	<ul style="list-style-type: none"> Enterprise account growth SMB growth

Clearly, the execution by a vendor of their internal goals could warrant an unfavorable reaction from their customers. Consider some potential customer interpretations of the vendor execution outlined above:

Tactic	Channel Customer	Enterprise Customer
Product Push	The vendor sales representative does not understand how we make money	The vendor sales representative does not understand my business
Adoption of New Technology	The vendor sales representative expects us to be guinea pigs with their unproven technology	The vendor sales representative is minimizing how we use our technology today
Channel Load/Unload	The vendor sales representative is trying to move product that my customers do not want	N/A
Enterprise Incentives	N/A	The vendor sales representative will automatically lower prices at the end of the current quarter
Enterprise Account Growth	The vendor sales representative is attempting to steal our best accounts	The vendor sales representative only cares about what I buy, not what I need
SMB Growth	The vendor sales representative wants to steal more of our accounts	The vendor sales representative has too many opportunities on their plate to be effective



Customers need to solve business problems for themselves and their clients. They want vendors to be trusted business partners that understand their needs. Unfortunately, many customers think their vendors are operating only in their best interest.

The key to changing this perception is to develop a sales process that works from the bottom up. Put simply, by creating sales representatives that are viewed as customer allies, vendors can begin to build meaningful relationships that in turn drive needed volume and profitability.

III. The Solution

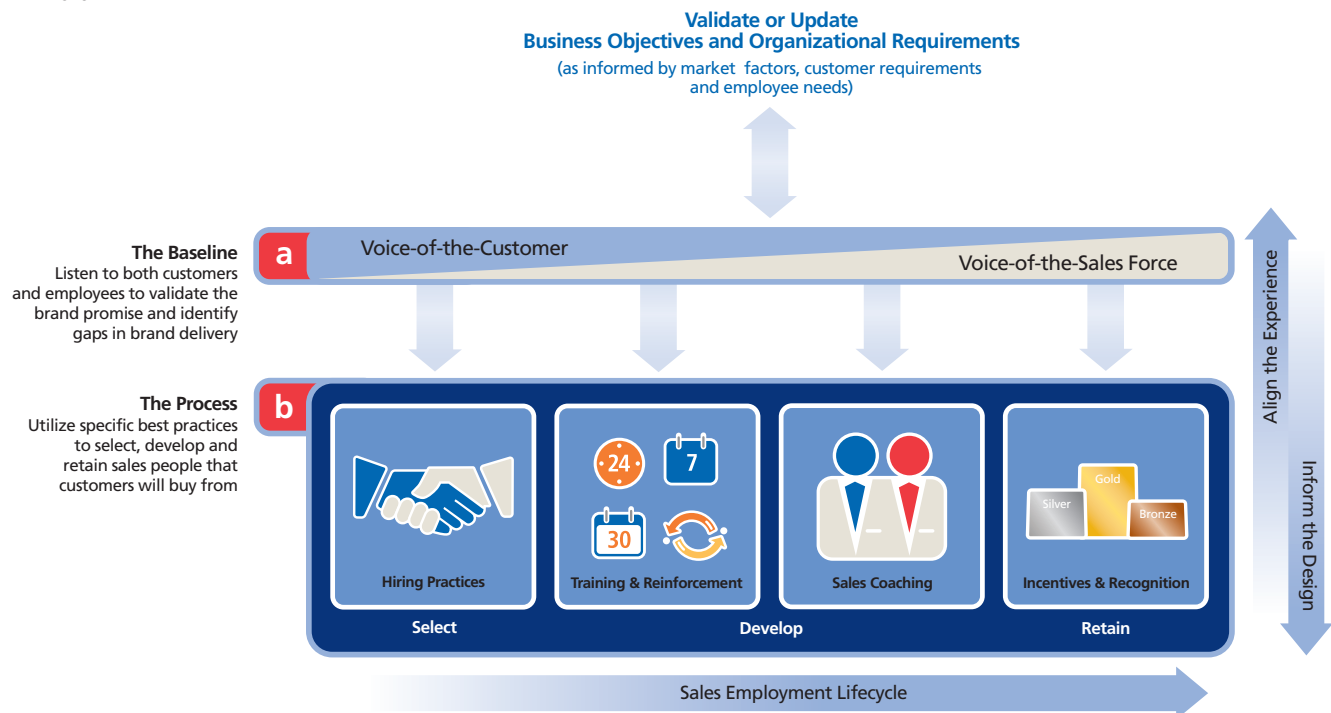
The best approach to sales force optimization is grounded in research and delivered through a defined set of best practices for hiring, training, coaching and motivating sales people (Exhibit 2).

While this approach can have an influence in any segment of a vendor's sales force, the cumulative impact is greatest when all sales representatives are considered. Fortunately, the model is essentially the same whether it is implemented for a channel sales force, an enterprise sales force or both.

IV. Validating the Brand with Customers and the Sales Force

More than ever before, customers are in the driver's seat – which is why many vendors are already working to better understand and respond to customer needs. Some vendors may integrate insights from the sales force to understand the gaps between current expectations and the vendor's actual capabilities. But while this information may be captured, it's rarely leveraged by vendors to drive critical decisions around hiring, training, coaching and motivating their sales people.

Exhibit 2:





Integrating customer and sales force research is the first step to differentiated service. By asking the right questions in the right way, vendors can establish a baseline that shows where the brand is making good on its promises and where it's falling short – for the vendor, their sales people and their customers.

When customer information is combined with sales force research, sales leaders have the power to identify – and close – critical gaps between customer expectations and execution. They can understand what is getting in the way of delivering against the brand promise. They can then validate or update their organizational design and sales processes to better prepare their sales representatives for success.

This combined information also helps sales leaders understand how to hire people that customers will actually buy from, how to develop and cultivate customer-focused sales capabilities and how to create individually-focused incentive and recognition strategies that embrace a sales person's needs and lead to sustained success.

Customer and sales force research can enable companies to connect to ongoing performance and drive informed decisions. It can be linked to important initiatives such as product launches, service level agreements, process improvements and sales force reorganizations. The resulting critical and ongoing data will enable businesses to map current sales objectives and anticipate future organizational requirements.

How do I do this?

There are many ways to collect voice-of-the-customer, voice-of-the-partner and voice-of-the-sales force data. Most organizations already have mechanisms in place. Consider the following sources:

- **Account Reviews/Benchmarking** – Account reviews and scorecards can provide detailed insight by asking current customers and sales people about the relationships they share.

- **Win/Loss Research** – Properly designed win/loss research can identify both the reasons as to why customers buy or don't buy from vendors and the challenges and opportunities that sales people encountered.
- **Qualitative Research** – Qualitative research, such as that derived through focus groups, advisory boards and customer symposiums can provide perspectives that standard surveys cannot.
- **Quantitative Research** – Quantitative research studies such as customer satisfaction and sales force engagement surveys can provide large amounts of statistically valid data for analysis.

However, an important component to this process is not how the data is collected but how it is analyzed and integrated. Establishing statistical linkage between the feedback and business results is vital to determine where to take action. In most cases, vendors should work backwards from the customer and sales force satisfaction data to determine what components of the sales process are the most critical influencers of purchasing behavior and develop best practices for addressing them.

For example, a channel customer might value a sales representative that can develop account penetration plans and make joint sales calls. But the sales representative may have 40 percent of their day consumed with administrative responsibilities. Or, an enterprise customer may desire a sales representative that can help build a detailed business case and co-present it to the CFO. But the sales representative is lacking the sophisticated tools and training needed.

By understanding what customers value and what sales people can deliver, sales leaders can begin to develop the most appropriate plan for action.



CASE IN POINT

Client: Office Equipment Manufacturer

Objective: Expand market share by creating differentiated offer in channel

Solution:

- Conduct Voice-of-the-Partner research to determine needs and preferences
- Change Vendor Rep selection and training process
- Change Partner offers to reflect Partner needs and preferences
 - Enhance Rep product knowledge training
 - Expand Rep development curricula to add account targeting, strategic selling, presentation skills, best practices, etc.
- Provide non-cash incentives for Rep training and sales performance

Results: In one year following program change:

- Partner Rep training increased 41 percent
- Manufacturer won the industry training award
- Sales increased, while market declined 14 percent

Training & Reinforcement: Use learning models that expand knowledge, recognize human learning processes and reinforce behavioral change.

Sales Coaching: Install a culture of performance-based coaching that builds on sales training through the enhancement and refinement of skills.

Incentives & Recognition: Create self-funded reward and recognition strategies designed to motivate new hires, the core and top performers.

A. Hiring Practices

Many organizations already have deep-rooted competency models in place to help them identify and recruit the right salespeople. There's no doubt that these strategies make a difference, but changing market conditions, fresh competition, and shifts in strategy require a flexible and nimble recruitment strategy — one that will define success today and down the road.

Understandably, many sales organizations are reluctant to change their hiring strategies because their models have been successful in the past. Their top-performers are unmatched when it comes to finding and closing deals. But unless every new hire is a great success, there are always gains to be made. Even a slight improvement in a vendor's recruitment strategy can incrementally begin to shift a sales team's performance by raising the bar – creating a "head start" to optimizing sales effectiveness.

Vendors can further improve hiring practices with the following approaches:

Integrate Customer Insights

A static competency model will not work in a dynamic, customer-driven sales environment. When employers integrate enterprise and channel feedback into the hiring process, trends can emerge that yield a smarter recruitment strategy and balance the successful skills of the past with the current and future expectations in the market.

Transition Knowledge to Sales Management

The individual traits of a prospective sales person are rarely communicated outside of the hiring process. By adding a profiling

V. Practical Application: Designing and Refining Best Practices

Sales force effectiveness protocols are designed to create business allies that understand and respond to customer needs. From the sales person's perspective, a properly designed and executed set of best practices can maximize retention, improve individual performance and increase success.

Establishing a baseline of the customer's value drivers and the employee's insights is a critical first step towards a more effective sales organization. The next step in a comprehensive sales effectiveness program is to leverage this baseline information in order to better deliver against the four critical tenets that impact sales performance.

The four tenets are:

Hiring Practices: Hire sales talent customers will buy from based on both the traits customer's value and the traits of high performers.

component that not only initially informs the organization if an applicant has top performer traits, but also communicates to sales managers how to train, coach, reward and recognize an individual throughout their career, can create even greater opportunities to maximize potential and foster retention.

How do I do this?

Addressing these two key points requires a systematic approach that collects and integrates relevant information into the hiring process. Most sales organizations can get started by partnering with their marketing and HR teams, where a great deal of this data currently resides.

To integrate customer information, sales leaders should take an active role in analyzing what traits are most valued by current and future customers. When trends emerge, they should be linked to existing competency models and prospect strengths.

For example, customers may place greater emphasis on strategic consulting while competency models may be heavily weighted towards skills that close the sale. Both of these traits are important in defining a successful sales representative, but applying too much importance to one over the other can result in recruitment strategies that are less effective. A strong consultant may spend a majority of his time contemplating strategy, while a strong closer may be perceived as too aggressive and unconcerned with understanding the customer's business requirement. The exact approach will vary by vendor but the key is balance between successful sales skills and customer needs.

Transitioning knowledge to sales management, on the other hand, generally requires an additional profiling component that translates an individual's personality traits into specific and actionable techniques for training, coaching and motivation. This information must be clearly communicated to each sales leader through individualized reports.

For example, does a specific sales representative's profile indicate that they need to be developed individually or do they prefer a team-based approach to problem solving?

Does another desire public recognition, career opportunities, non-cash rewards or face time with executives for a job well done? The key premise is that every individual is different. Understanding the drivers of each will help to determine the best development plan for maximum performance, engagement and retention.

B. Training & Reinforcement

Vendors that leverage sales training processes have a distinct advantage over their competitors. Yet many still struggle with driving organizational compliance to their training programs. With 62 percent of organizations taking at least seven months to integrate a new sales person⁴, it is increasingly critical that training programs are optimized to ensure that new skills translate into immediate performance.

When designing training programs it is important to include customer insights. For example, customer research often indicates that it is often more important that sales representatives understand a customer's businesses – e.g. economics, competitors, trends, issues, buying preferences, etc. – than to only understand a vendors products and solutions⁵.

Additionally, training programs must incorporate employee research to better understand both value-creating activities and obstacles to delivering them. A recent study indicated that activity focus is a critical differentiator between top performing sales representatives and those with average performance⁶. Only by understanding how sales people spend their days and what non-sales activities are imposed upon them can sales leaders begin to better inform, align and promote the right sales behaviors.

Training programs built around customer and employee research hold the power to transform sales teams by creating effective business allies. Vendors that want to maximize training effectiveness should consider the following:

Train for Individual Preferences

Individuals learn differently, and one-size-fits-all training methods simply don't work. Vendors need to cater to a

broader mix of learning styles – based on learning profiles of their unique sales force – and target those trainings to get the most out of their investment. By providing a variety of programs, companies can make an impact across a much wider audience and create a more positive (and inclusive) sales training experience that translates into sales growth.

Reinforce Concepts

New skills need to be put into action in order to stick. Training programs must promote the completion of specific tasks through an applied combination of post event electronic communication, an integrated link to a formal coaching process and non-cash reinforcement of both the sales person and sales leader.

According to research, the average individual retains only 13 percent of the information from a training session 30 days after a training event⁷. The right reinforcement plan – one that challenges training participants to re-engage at the 24 hour, one week and one month intervals – can improve retention significantly. Further, when communications are connected to a formal coaching process and reinforced with rewards they won't simply be managed, they will be completed.

Build Sales Communities

Training can set a foundation but can lose momentum when sales people return to the field. Sales teams need communities and networks to help them hold on to key information and connect the dots between training and real life applications. These opportunities are meaningful to sales forces because they facilitate the sharing of best practices, enable salespeople to share success stories and create a support network that drives sales performance.

How do I do this?

Most vendors already invest in sales training. Driving performance requires better targeting these investments to transform sales representatives into customer allies.

Training for individual preferences requires an in-depth evaluation of current programs coupled with an inherent understanding of how the sales force learns. Many vendors have found success by modifying existing curriculums to incorporate classroom training, self-directed learning and

role-playing opportunities – all of which must be based on customers' needs. By better aligning curriculums to sales force preferences, vendors can improve their sales training ROI.

For example, if a channel customer's top request is for help in generating more demand among their customers, sales representatives should be learning how to address that request through various training techniques. If, in turn, enterprise customers commonly ask for help in building a business case or demonstrating ROI, these concerns should define the training and tools offered to enterprise sales representatives.

Active reinforcement of training is usually accomplished by technology links to both the training itself and a formal coaching process. By adding a post-work agenda to training initiatives, it is possible to communicate reminders at 24 hours, one week and one month intervals to both the trainee and their manager or coach. This process keeps training top of mind by promoting tasks and discussions about the new material.

For example, if a sales person participates in a training program for preparing a business case, a reminder at 24 hours may prompt a discussion with a manager to select a specific client situation where the approach could be applied. At one week, the sales person and manager could be reminded to discuss a plan and set an appointment with a partner. At one month, a final reminder to discuss results and identify the next target account, ensuring that the training continues to translate into action.

Sales communities can often be developed through common collaboration tools. Existing intranets, shared drives and email groups are just a few reasonable and low cost alternatives to connect sales people. Whatever the approach, the focus should be on creating an informal network that promotes viable, on-going connectivity to contributed content – essentially building a virtual database that can solve future needs.

For example, if a sales person is facing an issue related to minimizing up-front client capital investment while still meeting vendor GP requirements, he may propose the situation to network peers. Potentially, another sales representative across the country may have faced a similar

issue and resolved it to benefit both the vendor and customer. Three months later when another sales person faces the same issue, he or she could locate the discussion thread and propose the same solution.

CASE IN POINT

Client: A Fortune 500 Food Company

Objective: Our client was looking to transition their direct sales force from “order takers” to business partners and solution sellers.

Solution: To better position the sales force to become business allies, new processes, procedures and technology platforms were needed. Items co-developed with client included:

- Business-focused learning paths, reinforced with both performance certification and recognition
- Coaching processes and on-the-job performance measurement tools
- Connection of customer satisfaction and business performance data to individual performance certification reviews

Results: In the four quarters following the program implementation, the client realized increases in both market share and sales volume. During the same period, the client was also rewarded with a 60 percent increase in the retention of their retail sales force.

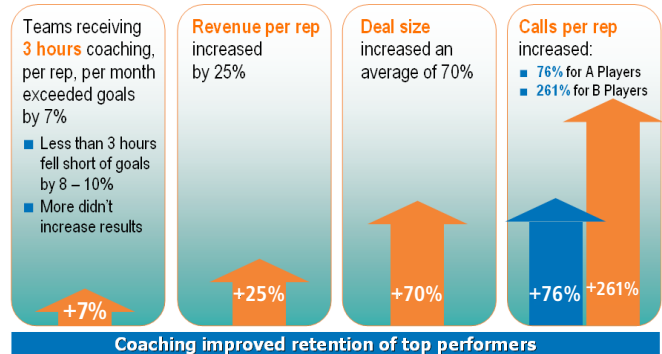
C. Sales Coaching

Coaching is one of the most effective ways to optimize performance and maximize the retention of sales people. Good sales coaches raise the bar on performance, helping each team member continuously improve.

According to a recent study, sales representatives receiving three hours per month of coaching exceeded their selling goals by seven percent, increased revenue by 25 percent and increased deal size by 70 percent. The same research also

concluded that calls per representative increased by a healthy 76 percent among top performers, and by 261 percent in the core⁸ (Exhibit 3).

Exhibit 3:



Clearly, coaching can become a dynamic and ongoing process that drives individuals to higher levels of success. Good coaches also promote greater satisfaction and retention of sales people. In the right hands, coaching has the potential to be a major differentiator.

To get the most from a coaching program, vendors should consider the following:

Focus on Individual Insight

Coaching is not about providing answers when sales people ask questions. A successful coach must create self-directed learning opportunities, generating individual insights by asking questions rather than providing answers. Effective coaching models use a solution-focused approach designed to stretch a sales person’s problem-solving capabilities.

Prepare the Coach

Being a coach requires a unique skill set, and it’s important to recognize that your best sales people are not necessarily ready to be your best sales coaches. Promoting the right people and preparing those already in leadership roles with a structured plan for coaching is critical to foster engagement. Processes and tools must have a direct link to training initiatives, be focused on specific tasks and deep rooted in positive feedback and recognition rather than corrective action.

How do I do this?

Developing a sustainable coaching program requires both a process and plan to create effective sales coaches. A vendor must begin by identifying the right people that will make effective coaches. This follows with training on formal, results-based coaching techniques and the tools to do the job.

A focus on individual insight is often created by providing the right framework. Coaches must be provided with the right tools and procedures to help sales people solve real world problems. These tools can be introduced to the prospective coach through classroom activity, role-playing scenarios and coach the coach sessions. The primary goal of these activities is to provide the coach with the means to share knowledge and build confidence in their sales people.

For example, imagine that a sales representative faces an issue where he has proposed a large product load to the partner but is getting little traction on the idea. A formally trained coach might then ask questions leading to insight that restructures the product load with different payment terms – instantly adding value to both businesses.

Preparing coaches, on the other hand, requires giving them the tools needed to exercise their skills in the field. Job aids, facilitation guides, and scheduling processes, when combined with electronic 24 hour, one week and one month reminders that are linked to sales person training initiatives, keep coaching top of mind and drive execution.

For example, a coach may receive notice that one of their sales people has been trained to develop ROI analysis. Pulling from a vendor-supplied tool kit, the coach would be able to facilitate a conversation with the sales person that helps them outline a favorable rate of return for a current client project.

CASE IN POINT

Client: Major Telecommunications Company

Objective: Solidify relationships with key customers so as to retain business in the midst of competitive price wars

Solution: Energize entire sales force by rewarding and recognizing account-specific milestone achievement

- Established milestones around sales results, training, building/solidifying client relationships; coached representatives for milestone achievement
- Moved funds from cash to non-cash awards to increase reward value
- Provided frequent recognition from senior executives

Results:

- Organizational sales target exceeded by \$50 million
- Per person sales increased 27 percent
- Long-term business relationships improved 50 percent

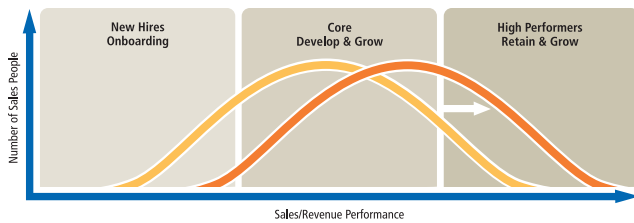
D. Incentives & Recognition

Salespeople make important contributions to an organization's overall success. In order to sustain and accelerate their growth; managers must ensure that all team members – not just the top performers – are fully engaged and motivated. Why? Recent research indicates that a five percent performance lift in the core translates into a 70 percent greater revenue increase than a five percent gain among top performers alone⁹.

Integrating best practices for hiring, training and coaching sales representatives will prepare an organization for success. But, without proper motivation for sales people, vendors will probably not see the significant performance gains that they envisioned. For this reason, a self-funding, non-cash incentive program – grounded in incremental improvement – should

be a critical component to any sales effectiveness solution. With the right design, these programs can address the individual motivators of virtually every sales person and shift the performance curve of the entire sales force to the right (Exhibit 4).

Exhibit 4:



Vendors can get the most from their motivation programs with the following approaches:

Maximize Top Performer Recognition Programs

Many top performer reward and recognition programs are designed without formally understanding what motivates and retains this core group. A more effective model should incorporate feedback from the people that are likely to qualify.

By listening to top performing sales people it is possible to take the guesswork out of every aspect of these programs. Many times, they will challenge commonly held perceptions about what program attributes are most effective. The result can be more effective program designs that engage more than just those who win each year – raising the stakes and increasing performance in the upper tiers.

Incorporate Incremental Rewards to Move the Middle

Engaging the core and new hires is essential, as more than 3/4 of reward program participants are not motivated by top performer programs. The main reason is because they simply don't perceive an opportunity to win¹⁰. However, because of their numbers, middle performers and new hires have an enormous potential to improve overall sales performance and their contributions should not be overlooked.

To maximize performance for the core and new hires, vendors should offer a self-funded incentive program that creates opportunities for everyone to earn meaningful and proportional rewards.

How do I do this?

By integrating employee feedback across all reward programs vendors create an unprecedented opportunity to drive engagement, maximize investments in training and coaching and produce results.

Top performer programs can be optimized by conducting surveys before programs are developed to insure maximum reach. When the top performer program is a travel reward, simply asking those who have the potential to win what attributes of the trip are most motivating, can go a long way towards optimal program design. Surveys that are designed to compare and contrast different trip structures can lead to insight that may not have been readily apparent.

For example, attributes such as face time with executives, beach vs. city locations, trip activities, room preferences and others can all have an impact on the motivational appeal of the reward. A well designed survey can identify the stated and derived importance of each attribute across the entire population – changing the scope of the reward and the drive for those to earn it.

Maximizing motivation for the core follows a similar process but focuses more on reward options and recognition preferences. By using a separate but detailed survey, it becomes possible to better understand the motivators of a diverse group. When the motivational preferences are collected they can be analyzed against a number of different reward options – leading to the right selection of rewards and recognition with the greatest reach.

For example, reward options ranging from recognition (public, private, peer, etc.) to various non-cash options (reward cards, gift certificates, reward catalogs, etc.) can be outlined to sales people. In the most basic model, each sales representative could select their top choices and an analysis could determine the combination that would motivate the maximum number of people.

CASE IN POINT

Client: Financial Services Company

Objective: Improve sales results of entire sales force rather than relying on growth from top performers alone

Solution: Design incentive program that would capture share-of-mind at all levels of the sales force while continuing to recognize top performers

- Maintain top-performer travel incentive for best performance in each product category
- Open rules structure to reward mid-level performers who surpassed annual goals by 10 percent
- Fund open structure with increased sales and generate positive ROI

Results:

- Two-thirds of mid-level performers qualified for travel award and contributed 80 percent of total sales growth for the year
- Mid-level players created \$14 million in incremental profit and outpaced the growth of top performers by 16 percent
- Client's sales increased 47 percent, three times the industry average

VI. Conclusion

Getting the most from a sales force is an integrated effort – requiring ongoing feedback from customers and employees that inform how sales leaders hire, train, coach and motivate individual sales representatives. By connecting these critical drivers, sales leaders create an opportunity to maximize the performance of their teams and the individuals that comprise them. By actively aligning vendor and customer needs, both parties can benefit – and look forward to a powerful and lasting partnership.

About the Author



Michael T. Spelley,
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As Corporate Vice-President and Managing Consultant, Mike Spelley is responsible for leading the Sales Effectiveness Practice at Maritz. With 30 years of experience, Spelley helps clients achieve objectives by developing programs that address the behavior of the people who impact results. He has broad expertise in a number of industries and has contributed to the development and delivery of points of view and performance improvement programs for such companies as Konica Minolta, Coca-Cola, AT&T, HP, Dell, Anheuser-Busch, and HON/Allsteel.

Spelley's expertise helps clients identify gaps between performance expectation and actual results. He educates clients on the development and execution of programs that address organic sales growth, improved productivity, new product launch, share and mix, employee recognition and retention and a host of other applications. Before becoming the leader of the Sales Effectiveness Practice, Spelley directed the operations group, project management and creative resources for Maritz.

Spelley has served on the St. Louis Sports Commission and the Board of the Olympic Festival. In this role, he led the effort to develop the presentation and business plan that brought the festival to St. Louis. Spelley received his Masters of Business Administration as well as his Bachelor of Science and Bachelor of Arts degrees in marketing and finance from Washington University.

Spelley has expertise in:

- Creating interventions designed to generate greater alignment, mindshare and loyalty from channel partners.
- Developing methodologies to improve the performance and selling effectiveness of direct sales resources.
- Counseling clients in the execution of non-cash performance improvement programs.

END NOTES:

- ¹Sales Executive Council, Enabling Channel Partner Relationships, 2005
- ²Sales Executive Council, Enabling Channel Partner Relationships, 2005
- ³Forrester Research
- ⁴Sales Performance Optimization / CSO Insights, 2006
- ⁵Maritz Channel Research, 2008
- ⁶Maximizing Sales Force Productivity, Sales Executive Council, 2006
- ⁷Evaluating Sales Training Programs, OnTarget Research
- ⁸Shifting the Performance Curve: Exporting High-Performance Sales Disciplines to the Core, Sales Executive Council, 2004
- ⁹Shifting the Performance Curve: Exporting High-Performance Sales Disciplines to the Core, Sales Executive Council, 2004
- ¹⁰Maritz Poll, 2004