



HARVARD Extension School | Professional Development Programs

STRATEGIC SALES MANAGEMENT

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APRIL 11–12, 2018 • DAY ONE



When you know your WHY,
you'll know your WAY.

Michael Hyatt

TEN CHARACTERISTICS OF HIGH PERFORMING SALES MANAGER

Module	Characteristic
1. Lead Yourself	<ol style="list-style-type: none">1. Consistent, relentless passion for your purpose2. Articulate a career strategy3. Need more customer knowledge: deepen and broaden relationships
2. Lead Your Direct Reports	<ol style="list-style-type: none">4. Design and live your championship culture5. Obsess on objectives and sales process6. Inspired recruiting, selecting, and hiring7. Train, onboard, coach, develop, and terminate8. Aligned motivation and compensation
3. Lead Your Organization	<ol style="list-style-type: none">9. Link colleagues to your sales team and enterprise customers10. “Lead up” to increase your organization’s performance



LEAD YOURSELF

1. Consistent, relentless passion for your professional purpose

Define your professional purpose, which must include “helping customers, your direct reports, and your colleagues attain the great feelings they get when they achieve their goals.”

Motivate yourself to live this purpose each day with contagious passion.

LEAD YOURSELF

1. Consistent, relentless passion for your professional purpose

The “Wonderful Paradox”:

“I have more fun and enjoy more financial success when I stop trying to get what I want and I start helping others get what they want.”

— Spencer Johnson

“My selling purpose is to help people get the good feelings they want about what they want and about themselves.”

— Spencer Johnson

“You can have everything in life you want if you will just help enough other people get what they want!

— Zig Ziglar

LEAD YOURSELF

1. Consistent, relentless passion for your professional purpose



“I help save lives, and improve the lives of dialysis patients, families, friends, physicians and nurses”
— Baxter



“I help provide insights and data to Improve decision-making for new therapies to help people, and to make better lives for market research in biopharma companies”
— Decision Resources Group



“I help provide insights and data to Improve decision-making for new therapies to help people, and to make better lives for market research in biopharma companies”
— PharMetrics



“I help save lives, and improve the lives of patients, families, friends, nurses, physicians, and administrators”
— NxStage

LEAD YOURSELF

2. Articulate a career strategy

- **Define your life goals**
- **Define your career goals** that will enable you to attain your life goals... you are the CEO of yourself
- **Create a diagram of your career** and the jobs and experiences that will help you attain your career goals
- **Track your goals and activities** that help you realize career goals
 - Your activities need to include enhancing relationships with people more senior in the organization as well as developing your leadership, self-motivation and self-development skills

LEAD YOURSELF

2. Articulate a career strategy

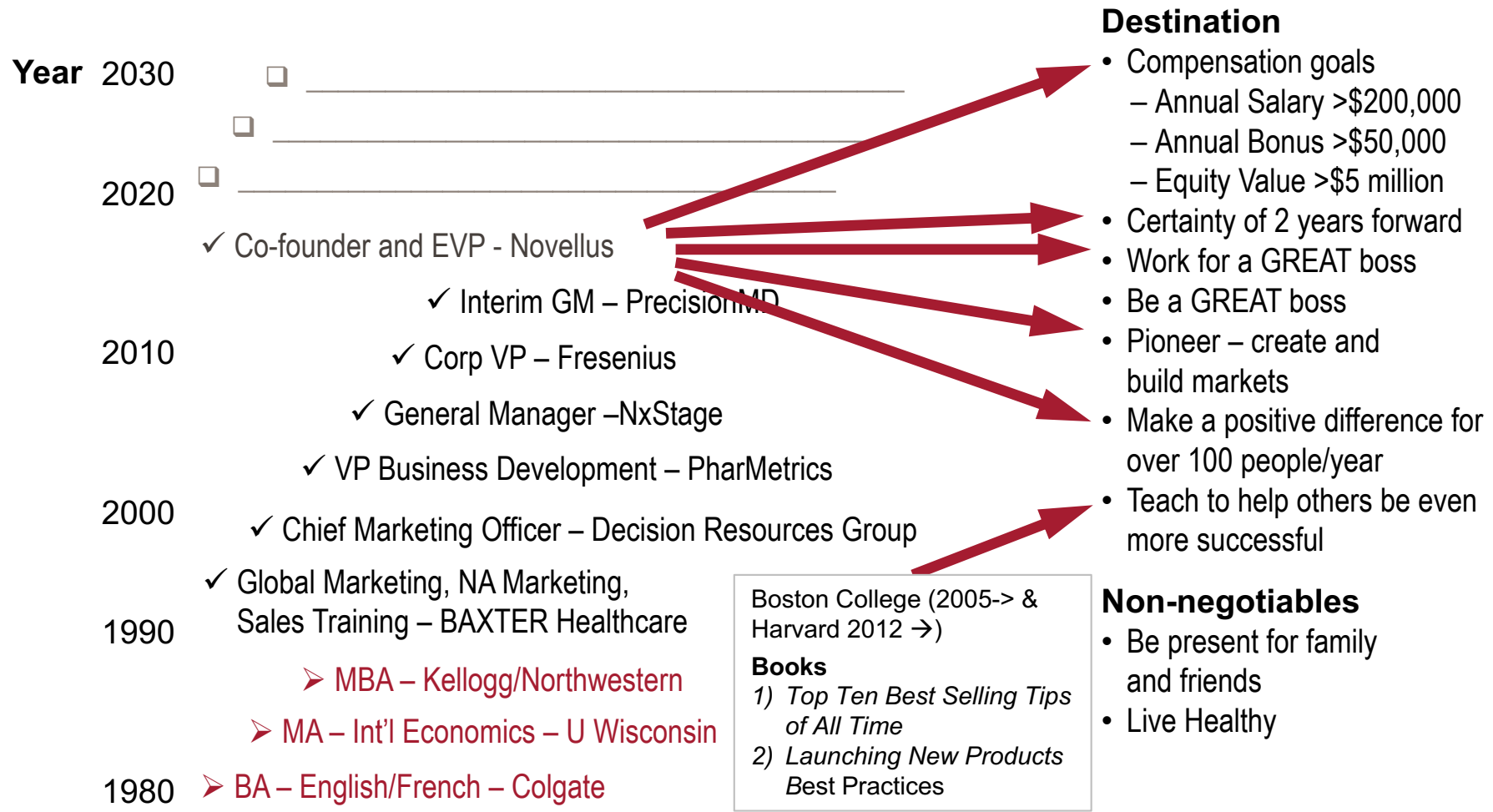
Life Priorities

	2005	2006	
	Actual	Desired	2005 Plan
1. With Jan, raise Matt, Carly and Luke	8	10	Quantity time -Matt, attend games, bball trip to Rio - Carly: Trip to Tampa, Middlebury, Montreal -Luke: UW football game, coach bball Europe: Nice, Venice, Paris, Brussels with family
2. Support family and friends	3	6	- do surprise - 1/year - invite to visit 2x/year: bball in feb, thanksgiving - visit in August - invite to basketball events - annual beach event - visit in San Diego - call this year, visit next year - visit on 5+ trips to Chicago - visit Mike and Jill, Studneks, Kotler, Gordon - publish letter on coach/teach
3. Evolve as human being	6	8	- yoga - tennis 10+ times, 5x/week gym/run/sport - volunteer on ASC board - annual 3 on 3 fund-raiser- Linda - help with Rwanda foundation - try 1 new thing/year: Teaching at BC - read 30 books this year
4. Financially support family	7	9	- NxStage, Critial Care General Manager - DUSA and/or CHI - multiple 401k's to Schwab - multiple 401k's to Schwab - teach at BC, 1 prof. development event
FUN ALL OVER - POSITIVE ENGERY, SMILES, LAUGHING			

LEAD YOURSELF

2. Articulate a career strategy

Career Destination and Roadmap: Example



LEAD YOURSELF

2. Articulate a career strategy

Resources:

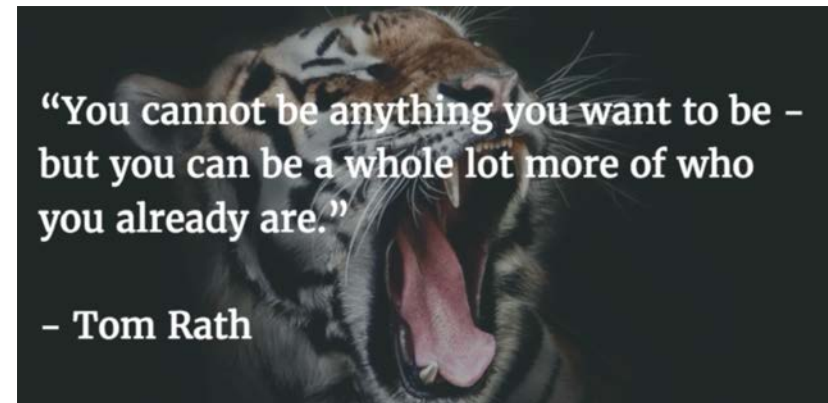
- **Self-Assessment**, for example:
 - *What Color is My Parachute*
 - *Strength Finders*
- **Self-Development**, for example:
 - *7 Habits of Highly Effective People*
 1. be proactive
 2. begin with the end in mind
 3. put first things first
 4. think win-win
 5. seek first to understand, then to be understood
 6. synergize, and
 7. sharpen the saw
 8. *find your voice and inspire others to find theirs*
 - *9 Things Successful People Do Differently*
 - ViaStrengths.com

LEAD YOURSELF

2. Articulate a career strategy

You are the CEO of your own business and you happen to be working for _____.

- What are you good at?
- What do you love doing?
- What do you most like to do that someone will pay for?
- Who will pay you to do this?
- How to job searching and to advance your career:
 - Strategy: “devising and employing plans... toward a goal”
 - Targets: company, function, level, individuals
 - Messages:
 - How you can help them and proof of your value?
 - What do you ask?
 - What do you tell?
 - Communication frequency and content
 - Get connected and follow-up



Example site: <https://joshkaufman.net/strengthsfinder-20/>

LEAD YOURSELF

2. Articulate a career strategy

You are the CEO of your own business and you happen to be working for _____.

What Color is Your Parachute Summary

First: Find out what careers or jobs your “flower points” to: If possible, you or they must combine two or three of your knowledges (fields) into one specialty: that’s what can make you unique, with very little competition from others.

Second: Try on careers before you decide which ones to pursue: So you need to go talk to people who are already doing the kind of job or career that you’re thinking about.

Third: Find out what kinds of organizations have such jobs: Before you think of individual places where you might like to work, it is helpful to stop and think of all the kinds of places where one might get hired.

Fourth: Find names of particular places that interest you: For a successful job-hunt you should choose places based on your interest in them, and not wait for them to open up a vacancy.

The Flower
“That One Piece of Paper”

PETAL 2
My Preferred Kinds of People to Work With:

- 1
- 2
- 3
- 4
- 5

PETAL 3
What I Can Do and Love To Do (My Favorite Transferable Skills):

1	6
2	7
3	8
4	9
5	10

My Favorite Traits (optional)

- 1
- 2
- 3
- 4
- 5
- 6

PETAL 4
My Favorite Working Conditions:

- 1
- 2
- 3
- 4
- 5

PETAL 5
My Preferred Salary Range:

Level of Responsibility I'd Like:

Other Responsibilities Hoped For:

PETAL 6
My Preferred Place(s) to Live (rearer or later):

- 1
- 2
- 3

PETAL 7
My Goal, Purpose, or Mission in Life (or my philosophy about life):

My Holland Code

PETAL 1
My Favorite Knowledges or Fields of Interest:

- 1
- 2
- 3
- 4
- 5

Favorite Mediums

- 1
- 2
- 3
- 4
- 5

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<https://www.impactinterview.com/2016/12/what-color-is-your-parachute-book-summary/>

LEAD YOURSELF

3. Need more customer knowledge

- Deepen and broaden your relationships
- Create and implement a plan that includes getting to know your current and future customers in a more complete manner
- Strengthen your strategic selling skills with a “strategic top ten” list of high value customers that you focus on with your team
- Improve your leadership insights and organizational power by teaching your colleagues about your customers’ needs and motivations, and your company’s competitive strengths and weaknesses



LEAD YOURSELF

3. Need more customer knowledge

Common Knowledge Gaps

■ Industry:

- history
- companies
- advocacy institutions (e.g., patient groups)
- global and national industry meetings
- publications
- news
- press releases
- social media

■ Customer:

- Thought leaders
- Influencers
- High Value customers
- Buying processes
- Decision-making maps
- *The Fox*
- Journal articles
- Company perspective on customers (from sales, marketing, and senior management)

■ **Company resources** to solve customer problems and seize customer opportunities—find out who can solve what problems for you and your team

- senior management
- peers
- processes

LEAD YOURSELF

3. Need more customer knowledge

Methods to increase customer knowledge

- **Knowledge gathering events**
 - Become friends with customers, customer advisory panel, focus groups, roundtables, surveys, and interviews
 - Industry Meetings: presentations, booths, and meetings scheduled in advance
 - Industry publications and online information and relevant topic information (e.g., Cialdini persuasion video and article)

- **Communication methods**
 - **Face-to-face meetings:** in-office, out-of-office, coffee/tea, drink, breakfast, lunch, dinner, plane/train/bus/car, on a walk, etc.
 - **Video:** Facetime, Skype, or Zoom (live or recorded)
 - **Phone:** call with- or with-out appointment, conference call, and individual call
 - **Writing:** email, text, social media (LinkedIn, Facebook, Instagram, Pinterest), thank you note, letter, mobile or stationary, phone/tablet/computer, or big screen

LEAD YOURSELF

3. Need more customer knowledge

Examples:



- Warm introduction from boss to 3 top customers. Met each customer at annual global industry event. Met with each customer individually in their offices to learn their perspectives and how our company fit with their jobs
- Held roundtable with 6 leading experts (customer advisory panel)
- Many visits to companies for group and individual meetings



- Interviewed company colleagues—sales, marketing, R&D, manufacturing, legal, and HR
- Warm referrals to leading MDs. Visits to hospitals, meetings with MDs, nurses, admin, and Biomedes
- Annual Industry meetings.
- Sponsored 7 roundtables of 10 MDs each in 7 US cities.
- Assigned top 10 'President/General manager/VP Sales' account lists for additional attention.



- Ride-alongs with 8 sales reps, phone survey with 12 reps to understand needs,
- Developed and implemented sales training on new products—2 days in NYC, 3 regional sales training meetings, and
- Weekly sales metric and best practice call, Additional weekly “hot topic” one hour training call

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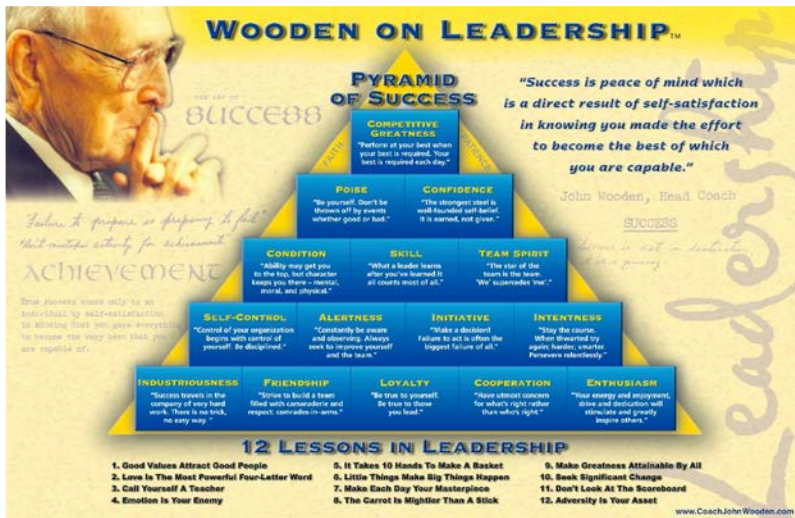
LEAD YOUR DIRECT REPORTS

4. Design and live your championship culture

- **Define and create the championship culture** that most effectively achieves your sales team’s goals. This includes: credible leaders, clear and compelling vision, core values, performance expectations, standards of behavior, systems to develop the culture, and your professional purpose.
- **Create a sales organizational structure** that considers the type of sales person (employee or contract—1099, “hunter” or “farmer”, etc.), wholesalers, resellers, and other partners, as well as reporting structure, training, coaching, and territory design.
- **Create a “command and control” process** to ensure your organization is focused on activities that drive your key metrics that lead to profitable sales.

LEAD YOUR DIRECT REPORTS

4. Design and live your championship culture



Stephen Covey's 7 Habits of Highly Effective People

Habit 1 Be Proactive

Habit 2 Begin with the End in Mind

Habit 3 Put First Things First

Habit 4 Think Win-Win

Habit 5 Seek First to Understand, Then to be Understood

Habit 6 Synergize

Habit 7 Sharpen the Saw

Navy Seals:

<https://www.inc.com/brent-gleeson/creating-a-winning-culture.html>

Southwestern Consulting:

<https://www.americanexpress.com/us/small-business/openforum/articles/10-steps-to-creating-a-top-selling-sales-culture/>



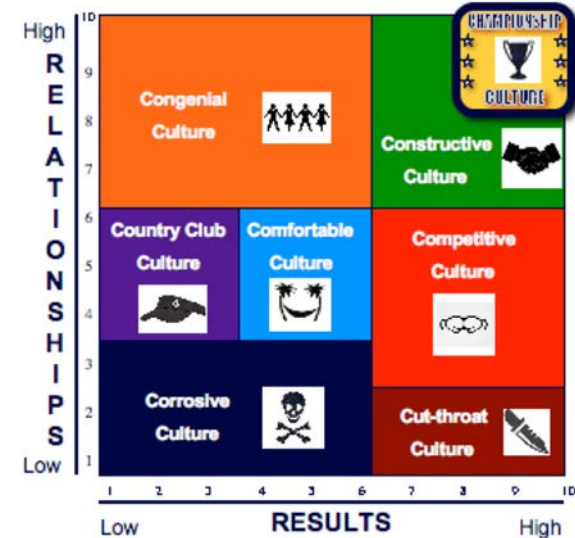
LEAD YOUR DIRECT REPORTS

4. Design and live your championship culture



Relationship ↑ (High) ↓ (Low)	HIGH RELATIONSHIP/ LOW TASK LEADER BEHAVIOR (S3) Facilitating/Counseling <i>In this style the leader and followers now share in decision making through two-way communication and much facilitating behavior from the leader, since followers have the ability and knowledge to do the task.</i>	HIGH TASK/HIGH RELATIONSHIP LEADER BEHAVIOR (S2) Selling/Coaching <i>This style most of the direction is still provided by the leader. The leader also attempts through two-way communication and socio-emotional support to get the followers psychologically to "buy into" decisions that have to be made.</i>	
	LOW RELATIONSHIP/LOW-TASK LEADER BEHAVIOR (S4) Delegating <i>This style involves letting followers "run their own show." The leader delegates since the followers are high in readiness, have the ability, and are both willing and able to take responsibility for directing their own behavior.</i>	HIGH TASK/LOW RELATIONSHIP LEADER BEHAVIOR (S1) Telling/Directing <i>This style is characterized by one-way communication in which the leader defines the roles of followers and tells them what, how, when, and where to do various tasks.</i>	
	(Low)	Task Behavior	(High)

8 KINDS OF CULTURES™



LEAD YOUR DIRECT REPORTS

4. Design and live your championship culture



Business: Pharmaceutical Market Research Reports

- Hiring and training: from 0 to 6 reps
- From \$12M to \$150M sales
- Reps became VPs and Presidents



Business: Hospital ICU dialysis technology

- Sales process, hires, training
- 92% close rate
- From \$2M to \$100M sales



Business: Home Dialysis technology

- Value Selling: 125 sales reps
- From 74% to 86% Market Share



LEAD YOUR DIRECT REPORTS

4. Design and live your championship culture

Championship Culture

1. Credible leaders
2. Clear, compelling vision
3. Core values
4. Performance expectations
5. Standards of behavior
6. Aligned systems to develop and spread the culture
7. Committed, competent, and unified team
8. Your professional purpose

Plus...

- A. Continual improvement process
- B. Sharing of best practices
- C. Relentlessly competitive for the company
- D. Highly competitive for individual performance
- E. Data-driven insights that driven improved actions
- F. Alignment with company functions

Adapted from: Jeff Jansen, <http://www.janssensportsleadership.com/resources/janssen-blog/6-key-components-of-a-championship-culture/>



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4. Design and live your championship culture

Core Values

Zappos

1. Deliver WOW through service
2. Embrace and drive change
3. Create fun and a little weirdness
4. Be adventurous, creative, and open-minded
5. Pursue growth and learning
6. Build open and honest relationships with communication
7. Build a positive team and family spirit
8. Do more with less
9. Be passionate and determined
10. Be humble

Accenture

1. Stewardship
2. The best people
3. Client value creation
4. One global network
5. Respect for the individual
6. Integrity

Toms Shoes

1. Give sustainably. Give responsibly.
2. Giving partnerships
3. Identify communities that need shoes
4. Give shoes that fit
5. Help our shoes have a bigger impact
6. Give children shoes as they grow
7. Welcome feedback and help us improve

Google

- Focus on the user and all else will follow.
- It's best to do one thing really, really well.
- Fast is better than slow.
- Democracy on the web works.
- You don't need to be at your desk to need an answer.
- You can make money without doing evil.
- There's always more information out there.
- The need for information crosses all borders.
- You can be serious without a suit.
- Great just isn't good enough.



LEAD YOUR DIRECT REPORTS

4. Design and live your championship culture

Sales Organization Common Considerations

- **Align with company SMART goals**
- **Composition of the team**
 - Employee profile: hunters and farmers, in-house and in-field
 - Number and level of people in each position
 - Management structure: reporting relationships
- **Compensation: reward and recognition**
 - Base salary, commission, bonus, benefits, contests, awards, recognition program, and company culture
- **Territory design and focus**
 - Accounts by geography and size, wholesalers and resellers, National accounts
- **“Command and Control” process**
 - Metrics, best practices, data collection and tracking, rankings
- **Professional development and continual improvement**
 - Training, coaching, mentoring program



GLOBAL SALES ACTIONS

- Make sales calls
- Make friends who are customer through warm referrals
- Assessed that this business could grow 20%/year (vs. 3%/year average)

What should I do?

- Be patient and let revenues grow before hiring more sales people
- Hire before revenues to drive sales
- Hire Sale Leader from the pharmaceutical information business (same market as Decision Resources)
- Hire Sales Leader with exceptional selling ability and pharmaceutical experience

CASE STUDY: TERRITORY DESIGN: 2006

What sales force improvements comes next?

1. Train reps on targeting, questions, messages, best practices
2. Create clinical positions (nurses) to retain large accounts so sales reps can focus on attaining new accounts
3. Expand the sales team with more junior sales reps
OR Expand the sales team with more senior sales reps
OR Do not expand the sales team yet

Results:

- Sales grew from \$2.6 million to \$8.8 million (plan \$5M)
- Won the business in 7 of top 10 hospitals

CASE STUDY: TERRITORY DESIGN: 2009

Lessons

- Team selling (important call had two or more NxStage people)
- Senior sales people can be higher return on investment
- New position – Relationship manager resulting in 100% retention and enabled sales people to sell vs. problem-solve in existing accounts

Results:

- Sales grew from \$8.8 million to \$24.5 million/year
- Won the business in 9 of top 10 hospitals, 27 of top 50 hospitals

LEAD YOUR DIRECT REPORTS

5. Obsess on your objectives and sales process

- **Create SMART goals** (Specific, Measurable, Actionable, Realistic, Time-bound) for yourself and your team for the year, month, week and day to ensure complete clarity and transparency.
- **Ensure that the goals are understood and memorized.**
- **Define your sales process**—create awareness, interest, try, buy, repeat buy, and raving fans—and **sales rep actions** at each stage.
- **Regularly communicate** what is working and not working so you continually improve the actions of all sales people.

LEAD YOUR DIRECT REPORTS

5. Obsess on your objectives and sales process

SMART (**S**pecific, **M**easurable, **A**ctionable, **R**ealistic, **T**ime-Bound)

Example:

Jan. 1, 2018:

- **Annual:** Attain 240 new machine sales by 12/31/18
- **Monthly:** 20 new machine sales/month
- **Weekly:** 5 new machine sales/week
- **Territory** (5 territories): 1 new machine sale/week, 5/month, and 50/year

LEAD YOUR DIRECT REPORTS

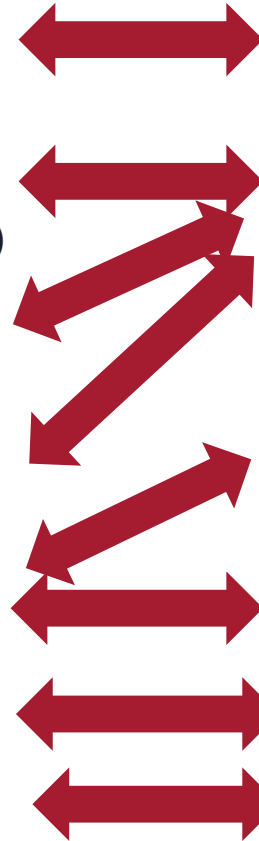
5. Obsess on your objectives and sales process

The Buying Process

1. Anticipation or recognition of a problem or need
2. Determination and description of the traits and quality of the needed item(s)
3. Search for and qualification of potential suppliers
4. Acquisition and analysis of proposals or bids
5. Evaluation of proposals and selection of suppliers
6. Selection of an order routine
7. Performance evaluation and feedback

The Selling Process

1. Awareness
2. Interest
3. Try
4. Buy
5. Repeat Buy
6. Raving Fan



LEAD YOUR DIRECT REPORTS

5. Obsess on your objectives and sales process

Buying Process

Stage	Client Behaviors	My Behaviors
1. Anticipation or recognition of a problem or need	Complaints or perceive lost opportunity	Targets, questions/messages via email, text, phone, video, face to face, social media
2. Determination and description of the traits and quality of the needed item(s)	Organizing process to buy	Needs analysis/discovery, find the fox, educate to facilitate buying process
3. Search for and qualification of potential suppliers	Seek our alternatives	Be the compelling, must have solution, secure customer advocate
4. Acquisition and analysis of proposals or bids	Internal conversations, pros/cons, get more info	Keep engaged to educate, answer questions, guide decision-making
5. Evaluation of proposals and selection of suppliers	Conversations and recommend/select	Keep engaged, follow coaching from advocate
6. Selection of an order routine	Contract	Keep engaged, follow coaching
7. Performance evaluation and feedback	Monitoring of performance, fix problems	Proactively monitor and keep in front of raising and resolving issues



LEAD YOUR DIRECT REPORTS

5. Obsess on your objectives and sales process

Selling Process

Stage	My Behaviors	Desired Client Behaviors
1. Awareness	Identify Targets, questions/messages via email, text, phone, video, face to face, social media	Asks for more information
2. Interest	Above plus qualify lead and expand targets in account	Lead is an excellent target
3. Try	Enable more trial of product/service or more engagement	Chooses and implements trial or more engagement
4. Buy	Compelling offer(s) tailored to customer needs	Buys at least 1 offer
5. Repeat buy	Upsell, cross-sell, renewals	Buys
6. Raving fan	Systematic development of customer (see raving fan development)	Becomes raving fan

Qualify collaboratively and quickly:

- Find areas to work on for mutual gain
- Together, learn about each other and agree on next steps

LEAD YOUR DIRECT REPORTS

5. Obsess on your objectives and sales process

Critical Event Timeline

Hospital/Customer Name:	John H. Stroger, Jr. Hospital of Cook County (IL)	Action	Owner	Start	Finish	Note(s)
Purchase Type:	Capital	GENERAL NEED Hospital Initiative	Dr. Peter Hart	03/14/14	X	Discussed concept @ NFK World Kidney Day.
Project Name:	Renal Replacement Therapy (RRT)	PROJECT LEAD Identify Project Point Person(s)	Dr. Peter Hart	06/01/14	X	Nephrology, Critical Care, Trauma/Burn Units.
Current Date:	1/27/2015	PEER PERSPECTIVE Guest Physician	Dr. Peter Hart	07/29/14	X	Dr. Mink Chawla RRT Overview to Nephrology.
<div style="text-align: center;"> 2015 </div>		NEEDS ANALYSIS Physician Review of Solutions	Nephrology	10/07/14	X	Consult Meeting w/ Vendor @ Hektoen Building.
		DEMO Vendor Presentation of Equipment	Dr. Paul Langlois	11/18/14	X	2 day demonstrations in multiple ICUs.
		BUSINESS CASE Customer Justification	Critical Care	NOV/DEC	X	Customer Internal.
		PRICING REQUEST Per Request of Hospital/Customer	Dr. Paul Langlois	12/05/14	X	Pricing & Agreement provided via email.
		COMMITTEE REVIEW Business Case Developed	Critical Care	12/16/14	X	Unanimously approved.
		OBTAIN CAPITAL Budget Approval	Admin/Purchasing	JAN/FEB		Customer Internal.
		FINAL DECISION Approval Process for Vendor	Admin/Purchasing	JAN/FEB		Customer Internal, open bid process.
		PURCHASE ORDER Process & Review	Admin/Purchasing	03/01/15		Customer Internal.
		PURCHASE AGREEMENT Process & Review	Admin/Purchasing	03/01/15		Customer Internal.
		PO & AGREEMENT Final Signatures	Admin/Purchasing	03/24/15		Customer Internal.
		SUBMITTAL Purchase Order & Signed Agreement	Admin/Purchasing	03/31/15		Customer sends via email to Vendor.
		REVIEW Purchase Order & Signed Agreement	Joint	04/01/15		Open Communication between Hospital & Vendor.
		CONFERENCE CALL Training Needs	Joint	04/08/15		Hospital/Vendor Teams work to assess needs & plan.
		DELIVERY/INSTALLATION Provided by Vendor	Vendor Team	04/20/15		Field Service Engineer.
		SITE PREP Clinical & Biomedical Enginee	Biomed	04/27/15		Customer Internal.
		DISPOSABLES ORDERING Cartridges & Fluids	Admin/Purchasing	06/01/15		Sample POs & suggested quantity provided by Vendor.
TRAINING MD, RN, ICU, Dialysis, Engineering, etc.	Dr. Paul Langlois	06/22/15		2 full weeks of Clinical Classes provided by Vendor.		
GO-LIVE 1st Patient Therapy	Dr. Paul Langlois	07/06/15		Clinical Education Support provided by Vendor.		
TRAINING Ongoing Bed-Side Support	Vendor Team	07/06/15		Clinical Education Support provided by Vendor.		
EDUCATION Continuing Support	Dave Garrison	ONGOING		Dedicated Therapy Specialist provided by Vendor.		



LEAD YOUR DIRECT REPORTS

6. Inspired recruiting, selecting, and hiring

- **Define your hiring needs**, create a hiring strategy including internal and external candidates and hiring process that includes feedback from interviewers and reference checks and others with permission
- **Define your ideal candidate**, target and hire people who can replace you and/or significantly upgrade the sales organization
- **Recruit through customers**, job postings, LinkedIn searches, Industry experts, Industry organizations, recruiters (retainer or contingency or temp-to-full time), universities, employee recruitment program
- **Hire with reward and recognition program**, great culture, great boss, clarity on how to win big
- **Use a specific onboarding plan** addressing each need of new hire

LEAD YOUR DIRECT REPORTS

6. Inspired recruiting and hiring

Candidate #1: Terrific experience, attitude, energy, aptitude, desire. Internal transfer from a ‘gatherer’ sales team to a ‘hunter’ sales team.

Lesson learned: *Priorities can change*

Candidate #2: Terrific experience, attitude, energy, aptitude, desire. Worked with VP sales in prior company. Lived in Vermont and territory was to be in New Jersey

Lesson learned: *Trust prior work experience*

Candidate #3: Good experience, attitude, energy, skills. VP of Research sensed something off. Sweaty palms with handshake.

Lesson learned: *Probe references*

LEAD YOUR DIRECT REPORTS

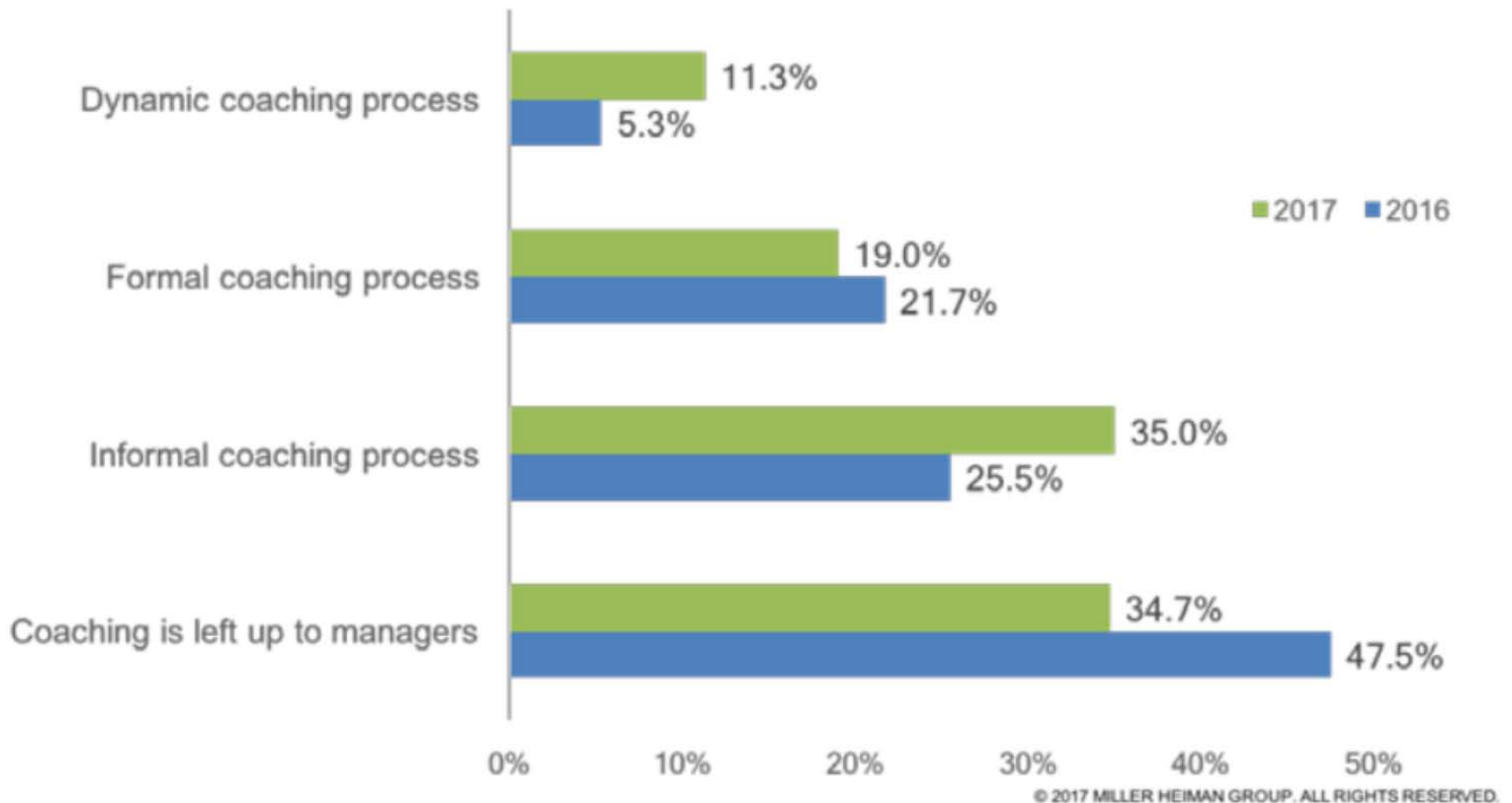
7. Train, onboard, coach, develop, and terminate

- **Partner with each person on your team** on their professional and personal development. Create and manage 30-, 60-, and 90-day plans for each new hire.
- **Ensure all sales professionals are assessed** for their strengths and weaknesses, and plans are in place to help each salesperson reach their full potential.
- **Use best coaching practices** to praise high performance and correct ineffective performance behaviors.
- **Use 30-day performance plans** to work with underperforming salespeople. When required, terminate underperformers while preserving their dignity.

LEAD YOUR DIRECT REPORTS

7. Train, onboard, coach, develop, and terminate

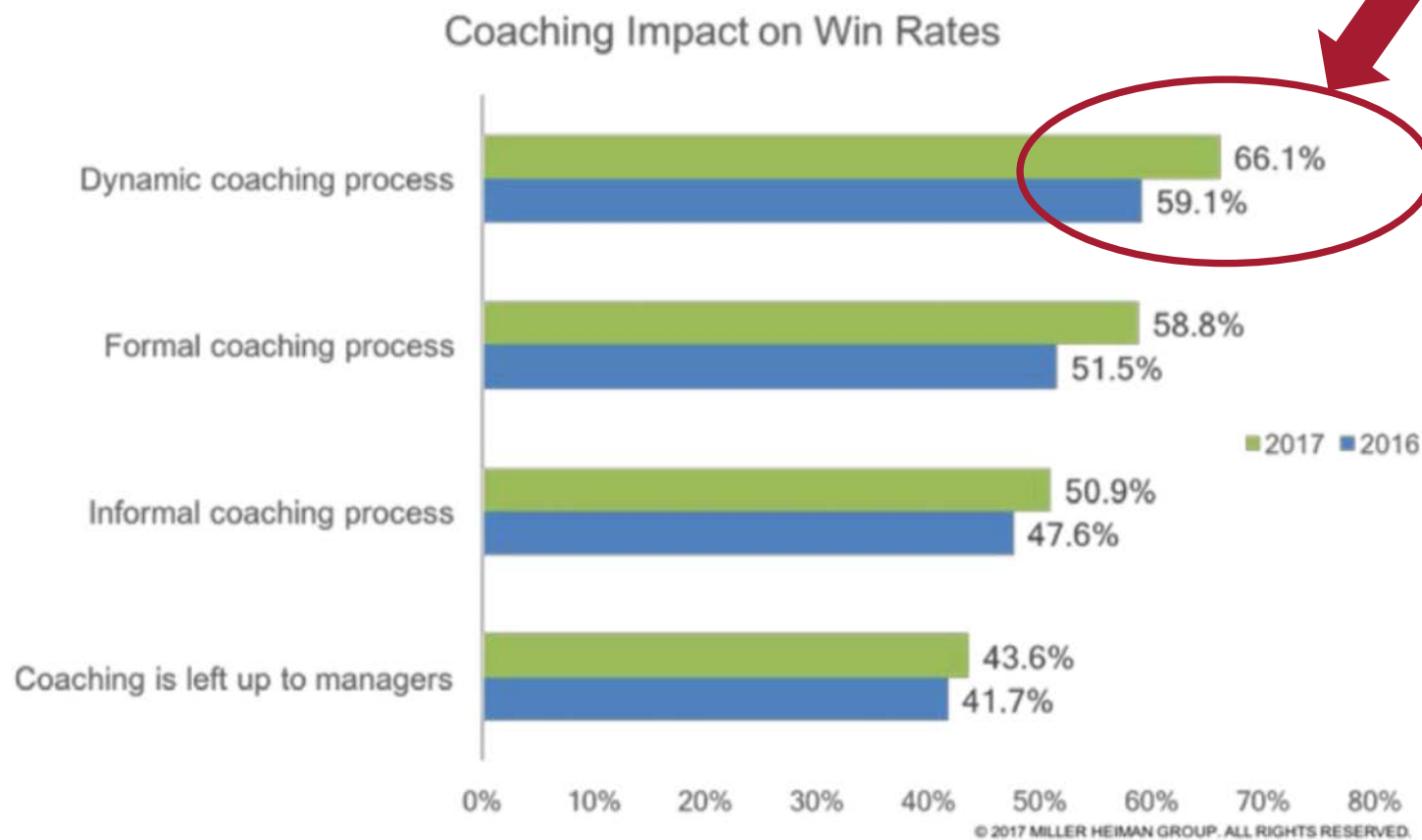
Organizations' Coaching Approach



LEAD YOUR DIRECT REPORTS

7. Train, onboard, coach, develop, and terminate

“**Dynamic coaching**”—formal mapping of internal processes to customer journey with feedback and adjustments—delivers highest win rates.



Source: 2017 Miller Heiman Group, Sales Enablement Optimization Study

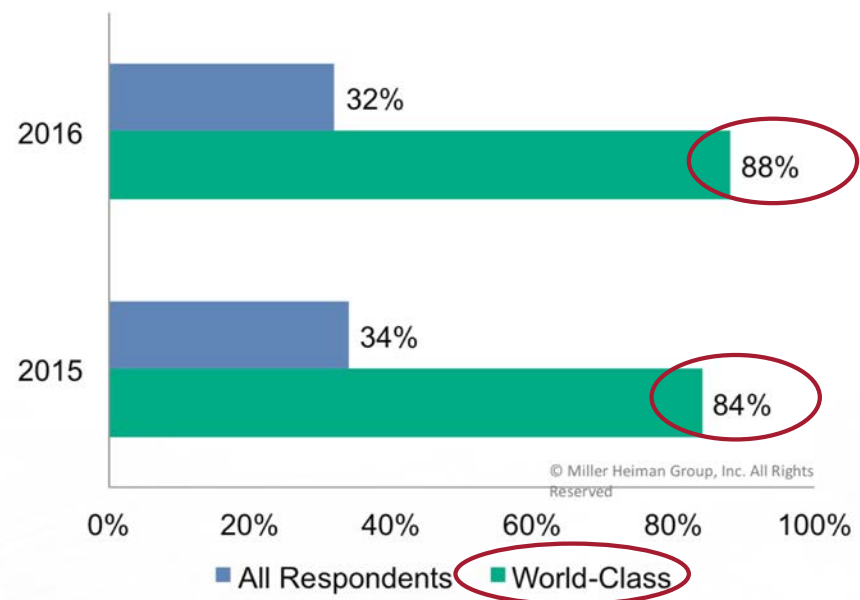
LEAD YOUR DIRECT REPORTS

7. Train, onboard, coach, develop, and terminate

“Sales managers spend adequate time coaching each individual” occurs in 84-88% of World Class Sales Performers”

Management and Execution:

In an average month, our sales managers definitely spend adequate time coaching each individual on the sales team



As mentioned above, World-Class Sales Performers translate the advantages of a formal coaching process directly into sales performance improvements such as increasing the win rate of forecasted deals by as much as 9%.

Source: 2016 Miller Heiman Group, Sales Best Practice Study



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Five Roles of Sales Coaches

Coaching Objective: Ensure maximum performance from each sales person

- 1. Define:** define goals and strategies that will tap into their purpose and maximize sales energy, focus and engagement.
- 2. Execute:** habits that will enable them to reach their goals, be efficient and maintain current, written and public action plans.
- 3. Advise:** provide guidance, asking exploratory questions that enable salespeople to find their own answers. Offer direct advice about specific opportunities. Determine whether to be more directive (“do this”) or facilitative (“let’s work out next steps together”).
- 4. Develop:** help salespeople see current state of their competencies and their potential. Build development plans to build on strengths and fill gaps.
- 5. Motivate:** understand the underlying motivators of each individual seller and take action to maximize them.

<https://www.iamagazine.com/magazine/read/2015/12/01/5-keys-to-successful-sales-coaching>



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Sandler Brief: No More “Take it from the Top”

Up-front contract

- **Objective.** The reason or reasons for the interaction participants.
- **Time elements.** Both sides need to agree up front on the “where,” the “when,” and the “how long” of this interaction.
- **Prospect’s role.** What do you expect the prospect to do prior to the meeting?
- **Salesperson’s role.** On an initial sales call, your role will be to pose questions and gather relevant information.
- **Outcome(s) you are looking for.** What decisions should be made by the end of the meeting? What conclusions should be reached?

Source: “Sandler Brief: No More ‘Take It From The Top’ ” by Jeff Schneider, *Sales Process* February 22, 2018



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Example: Here is what a good up-front contract might sound like in action as you begin your meeting:

“I appreciate you taking some time to meet with me to discuss_____. Do you still have 45 minutes? Great. As we discussed via email, you are likely to have questions for me in the areas of_____, _____, and _____. Are there any other questions you might want to cover today? Obviously, I too will have some questions for you, such as _____, _____, and _____. Is it OK for me to ask those? Great. Typically, at the end of our time together, we should be able to decide together whether it makes sense for us to go on to the next step of scheduling a second meeting. Does that work for you?”

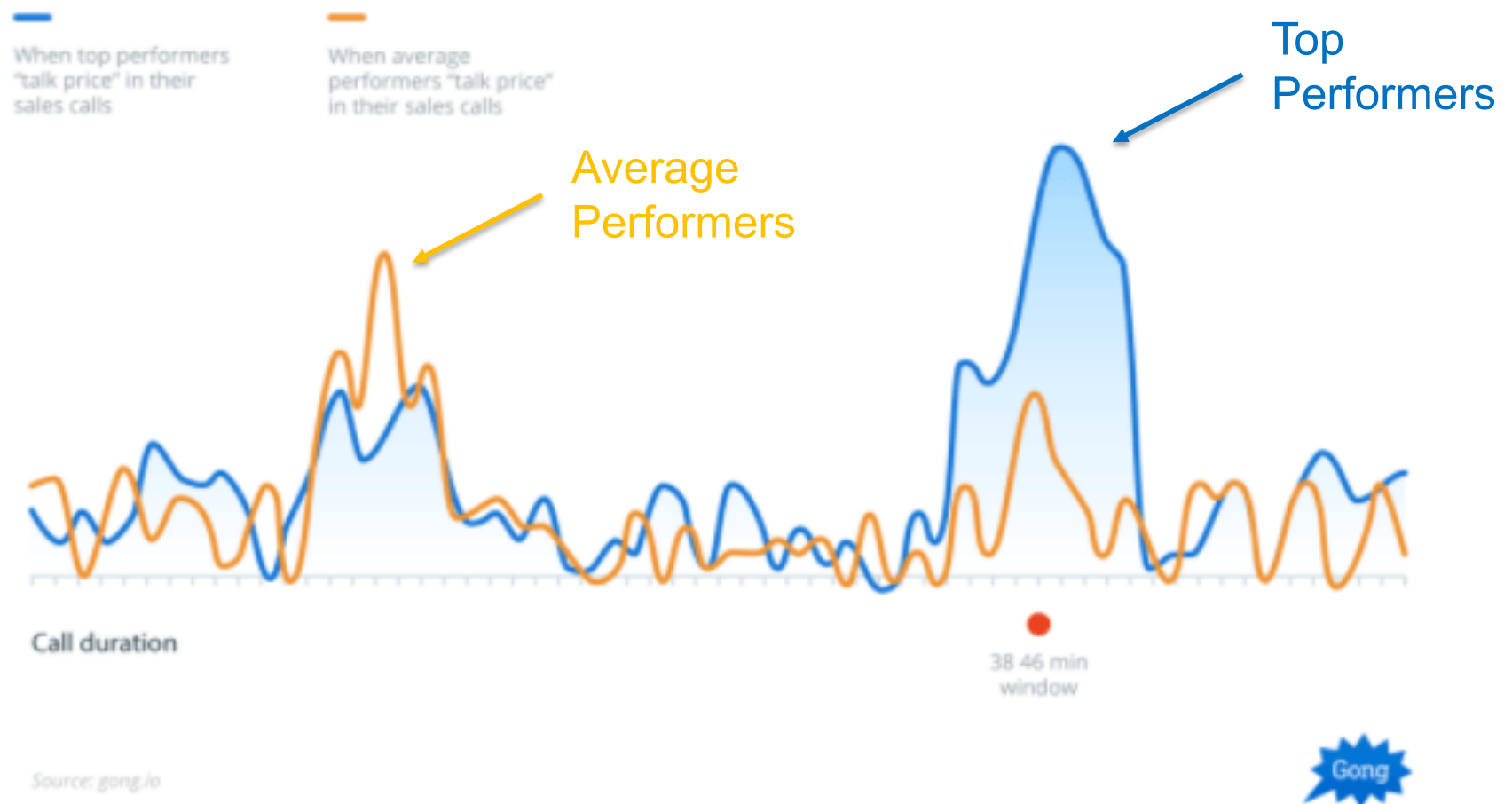
Source: “Sandler Brief: No More ‘Take It From The Top’ ” by Jeff Schneider, *Sales Process* February 22, 2018



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Data from 1 Million Sales Calls Explains the Difference Between Top



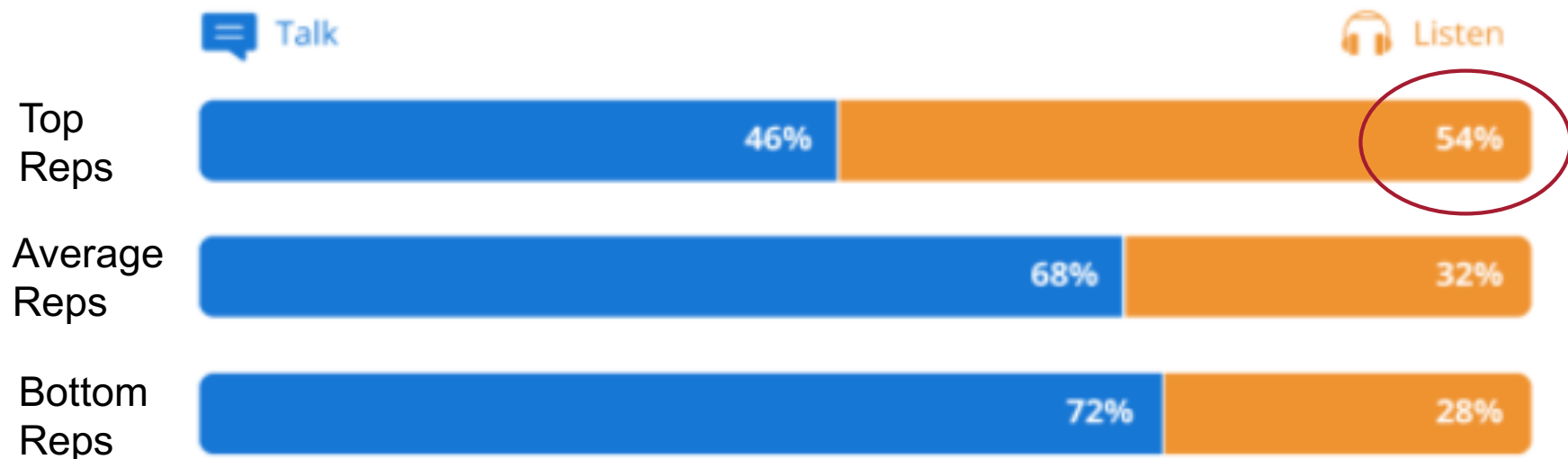
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Data from 1 Million Sales Calls Explains the Difference Between Top Reps

Discovery Call Talk / Listen Ratios:

Top, Middle, and Low Performers



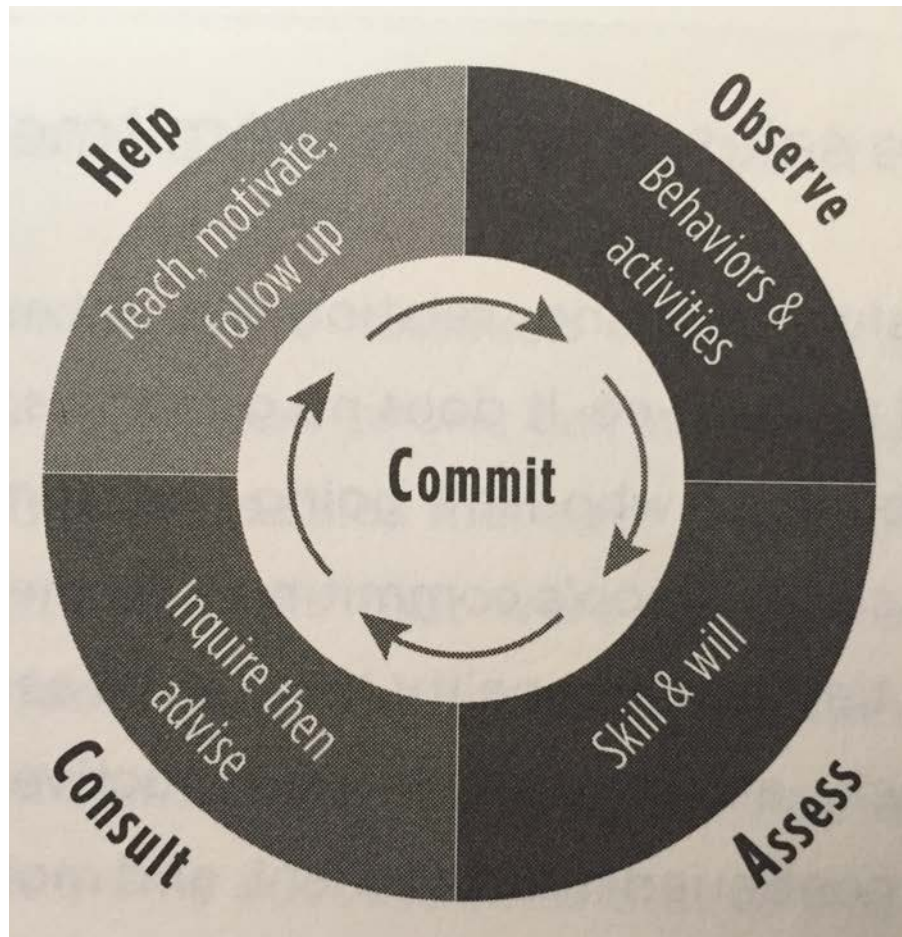
Source: gong.io



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C.O.A.C.H. Model (Commit, Observe, Assess, Consult, and Help)



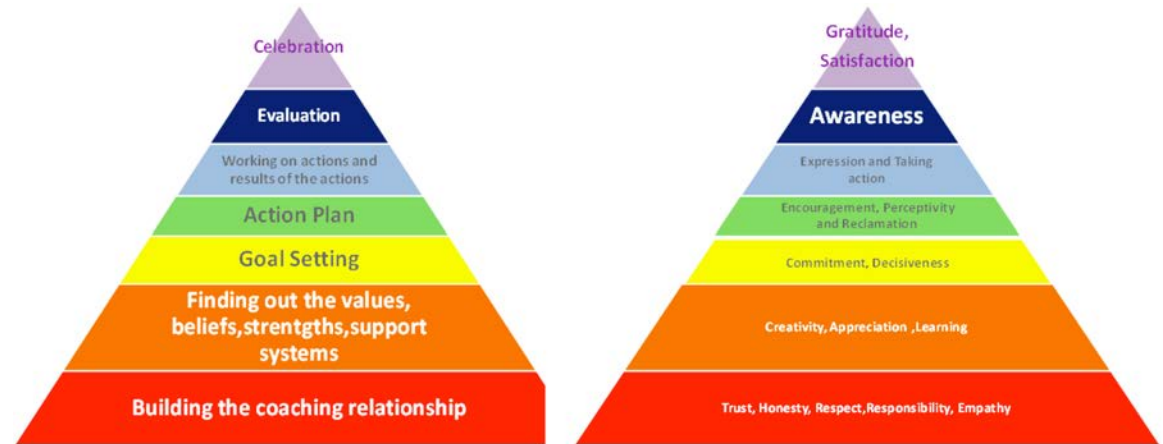
Source: *Sales Manager's Guide to Greatness*, Kevin F. Davis



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Coaching Models



<https://coachcampus.com/coach-portfolios/coaching-models/ayca-ulku-the-pyramid/>

Step UP <u>Coaching</u>	
C o-Creating	Help clients create their own future through active awareness building , maintaining confidentiality and not being judgmental
O utcomes	Work with clients to set SMART (Specific ,Meaningful, Actionable, Relevant and Time-bound) goals
A ctions	Facilitate the client taking the required action to achieve the desired outcome and meet his goals and enjoy the process
C ommitment	Ensure there is a sense of purpose, commitment and enthusiasm in the progress being made by the client
H arvesting	Are the small baby steps taken so far, time bound and yielding the desired result and is the environment conducive to the progress
I ndividual	Make sure the process is helping the client achieve in individual excellence and harmony with all his values
N urtured	Ensure the process is helping the client further nurture his dream and life purpose positively
G oals	The direction of movement from where they are, to where they can be should be clear, without any hesitation or the fear of failure

<https://coachcampus.com/coach-portfolios/coaching-models/r-mahesh-lyer-step-up/>



<https://coachcampus.com/coach-portfolios/coaching-models/cindy-chen-growth/>



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Exemplary Leadership

Top 5 Items

1. Enable others to act
2. Model the way
3. Encourage the heart
4. Challenge the process
5. Inspire a Shared vision

<http://www.leadershipchallenge.com/about-section-our-approach.aspx>



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Exemplary Leadership: What Buyers Say They Want from Sales People

Top 5 Items	The Seller . . .
Enable others to act	<ul style="list-style-type: none"> • fully answers my questions and provides relevant, timely useful information • seller treats others with dignity and respect • involves me in decisions that directly impact job performance • acknowledges and affirms my ideas and brainstorms
Model the way	<ul style="list-style-type: none"> • is clear about values and consistently upholds them • builds consensus with me around a set of values and standards for our working together • asks for feedback on how her/his actions affect my decisions and outcomes
Encourage the heart	<ul style="list-style-type: none"> • provides appreciation and support for me and other members of my team for the work we do together • gets personally involved in recognizing people and celebrating accomplishments • Tells stories of encouragement about the good work we are doing
Challenge the process	<ul style="list-style-type: none"> • Takes initiative in anticipating and responding to changes • Identifies measurable milestones that keep the project moving forward • asks, “What are we learning?” when things don’t go as expected
Inspire a shared vision	<ul style="list-style-type: none"> • Speaks with genuine conviction about the higher meaning and purpose of our work and relationship • Paints the “big picture” that includes what I aspire to accomplish • Inspires me to share a compelling dream of the future

Source: Stop Selling and Start Leading, Amos Kouzes, Barry Posner and Deb Calvert, 530 B to B buyer survey
<https://www.slideshare.net/Apttus/b2b-sales-behaving-as-a-leader-results-in-greater-customer-engagement>



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Exemplary Leadership: What Buyers Say They Want from Sales People

Buyer's Ranking #1



Enable Others to Act

Overall	%	Behavior	Now	Meet	Buy	Now	Ideal
12	9.39	The seller develops cooperative relationships among the people he/she works with.	3.69	4.00	3.89	3.89	4.14
6	23.6	The seller engages in two-way dialogue with me as he/she strives to understand my needs	3.82	4.12	4.12	3.98	4.18
2	30.9	Seller treats others with dignity and respect.	4.11	4.18	4.13	4.19	4.36
4	32.4	The seller involves me in the decisions that directly impact our job performance.	3.82	4.12	4.07	3.89	4.19
7	43.0	The seller acknowledges and affirms my ideas and is willing to brainstorm with me to build new ideas and insights together.	3.60	4.01	3.98	3.82	4.07
1	62.7	The seller fully answers my questions and provides information that is relevant, timely, and useful.	3.90	4.16	4.23	4.05	4.25

<https://www.slideshare.net/Apttus/b2b-sales-behaving-as-a-leader-results-in-greater-customer-engagement>



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Example #1: Train and develop

- Onboarding plan – 30, 60, 90 day plan
- Formal training program
- Ride-alongs with other reps, managers, marketing, etc.
- Formal mentor in the sales organization
- Industry meetings
- Connect new rep with current customers from same and other territories
- Local, regional and national sales meetings
- Weekly sales call

Example #2: Terminate with a Performance Improvement Plan

- Document goals and status
- Review, in person if possible, goals and activities over the next 30 days
- Agree to meet again to review in 30 days with the outcome being either you are no longer a good fit for the position or another 30 day improvement plan

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7. Train, onboard, coach, develop, and terminate

Example Training Program

(planning process includes sales person input)

- **Individual training and development plan**
- **Weekly training call on best practices – 1 hour**
- **Monthly won/lost call – 1 hour**
- **Quarterly training meeting – 4 hours**
- **Annual sales meeting** with training and motivation goals Common topics include:
 - Company strategy, performance, and plan
 - Sales awards
 - Market and competitive update
 - Customer perspectives (face-to-face, live video, or video)
 - Company marketing and sales strategy
 - Time and territory management
 - Legal/ethical issues
 - Technology
 - CRM, devices, expenses, and payroll
 - Best selling practices throughout the sales process
 - Product knowledge
 - Reward and recognition program

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Sales Methodologies

- Challenger Selling
- Corporate Visions
- Sandler Selling System
- Miller Heiman
- Rain group
- Solution Selling, Conceptual Selling
- MEDDIC
- Customer Centric Selling
- SPIN Selling, Value-Based Selling
- Trust Triangle



Trust Triangle Sales Methodology



<http://blog.sellingpower.com/gg/2016/07/the-top-10-sales-methodologies-you-should-consider-for-your-business.html>



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Example Sales Methodology

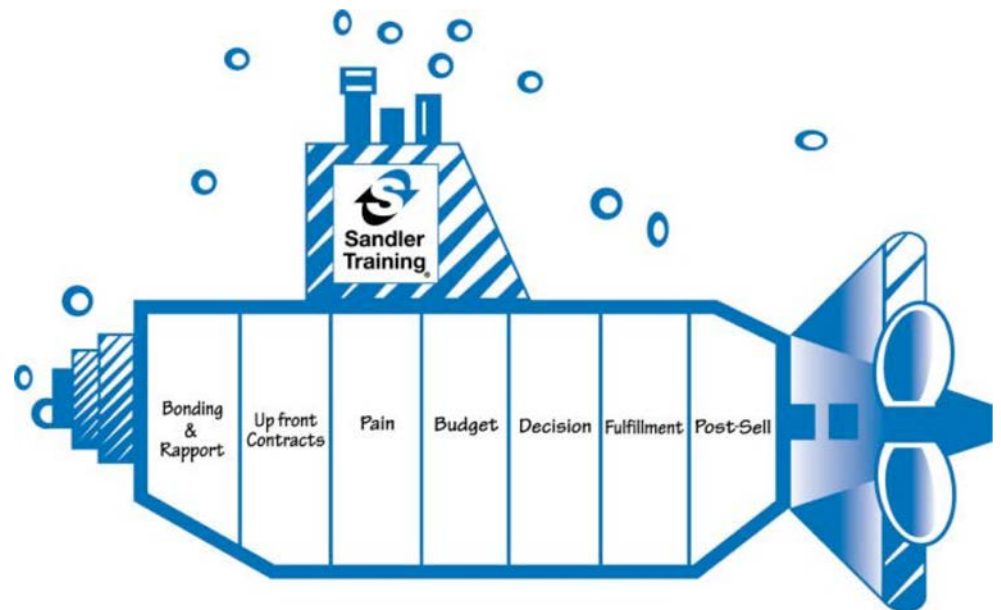


Sandler Training
Finding Power In ReinforcementSM

Competencies and Proficiency



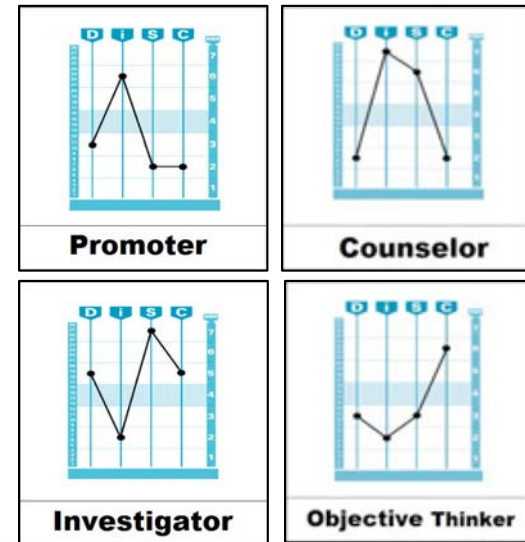
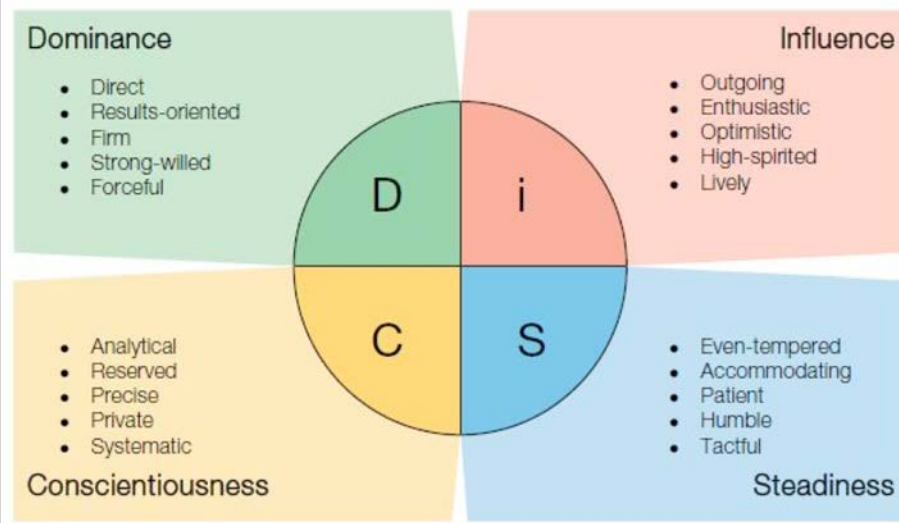
Systematic Process



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Selling to the Buyer's Style



What's Your Personality Type?

Use the questions on the outside of the chart to determine the four letters of your Myers-Briggs type. For each pair of letters, choose the side that seems most natural to you, even if you don't agree with every description.

1. Are you outwardly or inwardly focused? If you: <ul style="list-style-type: none"> • Could be described as talkative, outgoing • Like to be in a fast-paced environment • Tend to speak out loud with others, think out loud • Enjoy being the center of attention then you prefer E Extraversion	<ul style="list-style-type: none"> • Could be described as reserved, private • Prefer a slower pace with time for contemplation • Tend to speak out loud with others, think out loud • Avoid other situations that be the center of attention then you prefer I Introsion
2. How do you prefer to take in information? If you: <ul style="list-style-type: none"> • Focus on the reality of how things are • Pay attention to concrete facts and details • Prefer ideas that have practical applications • Like to describe things in a specific, literal way then you prefer S Sensing	<ul style="list-style-type: none"> • Imagine the possibilities of how things could be • Notice the big picture, see how everything connects • Enjoy ideas and concepts that they can take • Like to describe things in a figurative, poetic way then you prefer N Intuition
3. How do you prefer to make decisions? If you: <ul style="list-style-type: none"> • Make decisions in an emotional way, using logical reasoning • Value justice, fairness • Enjoy finding the flaws in an argument • Could be described as reasonable, level-headed then you prefer T Thinking	<ul style="list-style-type: none"> • Base your decisions on personal values and how your actions affect others • Value harmony, forgiveness • Like to please others and point out the best in people • Could be described as warm, empathetic then you prefer F Feeling
4. How do you prefer to live your outer life? If you: <ul style="list-style-type: none"> • Prefer to have matters settled • Think rules and deadlines should be respected • Prefer to have detailed, step-by-step instructions • Make plans, want to know what you're getting into then you prefer J Judging	<ul style="list-style-type: none"> • Prefer to leave your options open • See rules and deadlines as flexible • Like to improvise and make things up as you go • Are spontaneous, enjoy surprises and new situations then you prefer P Perceiving

http://www.kordellnorton.com/selling_skills_using_disc.htm

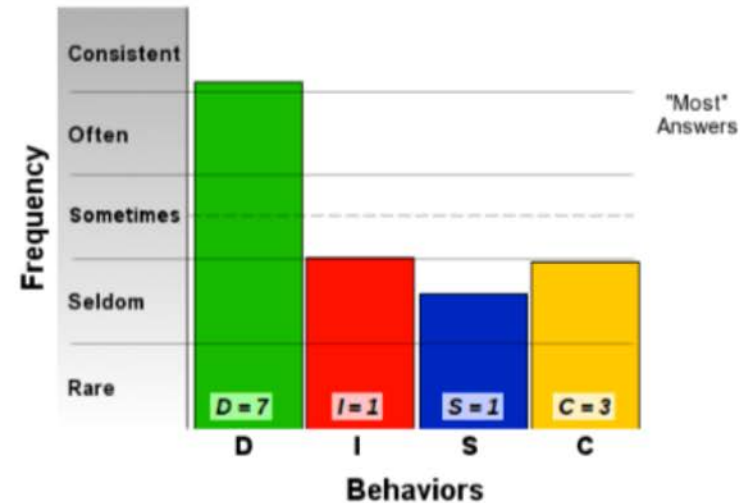
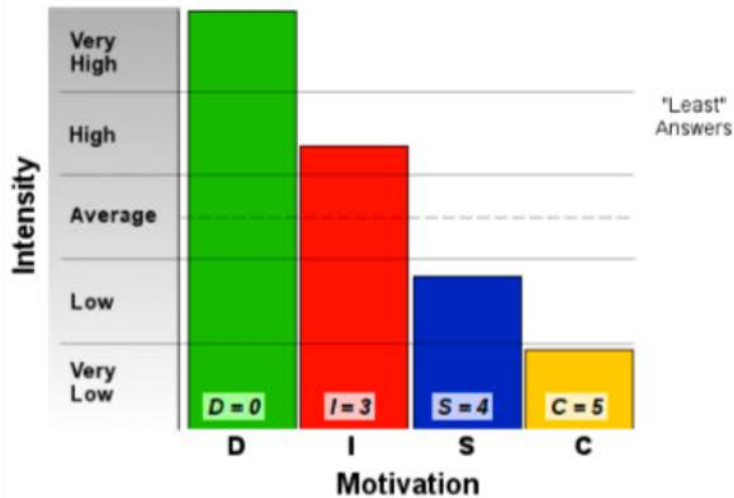


Your style is D/I

Your Natural / Internal Style

Your Adapted / External Style

The bar graphs below show the intensity or consistency of each style in your blend.



Your natural, or internal, style represents the internal motivations that drive you the most. This is the part of you that is likely to represent how you think or feel about situations more than it represents how you act or behave. Some people say that this represents who you are rather than what you do. It is also the part of you least likely to change throughout your lifetime.

Your adapted, or external, style represents the way that you tend to act or behave. It's the part of you that others are most likely to see. This part of you often represents how you have learned to adapt or adjust your behaviors to be successful in your environment. These behaviors can change depending on the environment you are in or thinking about when you take the assessment.

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8. Aligned motivation

Characteristics of:

High “D”	High “I”	High “S”	High “C”
<p>Competitive, enjoys a challenge, problem solver, direct and to the point, takes charge.</p>	<p>Strong need to interact with others, talkative—may have difficulty listening, positive sense of humor, may be disorganized, optimistic and enthusiastic.</p>	<p>Great listener, methodical and patient, will want to finish a project before starting another, has a need to serve others, needs preparation for proposed changes—does not like change for the sake of change.</p>	<p>Extremely organized, pays attention to detail, likes to have supporting evidence and may worry about the consequences caused by change.</p>
<p>Do not ramble on or waste their time—Be brief, be bright, be gone!</p> <p>Stick to business. Do not chitchat.</p> <p>Do not come with the decision made.</p> <p>Disagree with the facts, not the person.</p>	<p>Allow time for relating and socializing. Do not be impersonal or task oriented.</p> <p>Put details in writing. Do not leave decisions undecided.</p> <p>Provide testimonials from people they see as important or prominent.</p> <p>Listen and let them talk but do not get lost in conversation.</p>	<p>Start with personal comments—break the ice. Do not rush into business or the agenda.</p> <p>Listen and be responsive. Do not force a quick response.</p> <p>Do not be demanding or forceful. Slow down and allow time for them to decide.</p> <p>Build and maintain trust—do not promise something you cannot deliver.</p>	<p>Prepare your case in advance. Do not be disorganized or messy.</p> <p>Provide facts and supporting information. Do not force a quick decision.</p> <p>Do what you say you can do. Do not fail to follow through.</p> <p>Allow them their space. Do not touch them.</p>



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7. Train, onboard, coach, develop, and terminate

Raving Fans

Raving fans describes customers who . . .

- Purchase and believe in our products and people
- Are loyal and passionately recommend you to colleagues
- Provide unsolicited praise and suggestions to the company
- Will forgive poor quality and will tell you about them to help you fix them
- Extol your virtues voluntarily to their colleagues and friends when you are not there
- Feel connected to something bigger than themselves that your company represents



Launching New Products

Best Marketing and
Sales Practices



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7. Train, onboard, coach, develop, and terminate

Creating Raving Fans Example: **Physicians**

Customer Development Assessment

Customer	Stage 1 Beginner	Stage 2 Intermediate	Stage 3 Advanced
Physicians	<ul style="list-style-type: none">Physicians somewhat interested	<ul style="list-style-type: none">One physician recognized as expert in the hospital, other physicians interested in therapy and productPlan for studies, publications, and speakingSystematic fellows training on the therapy and product	<ul style="list-style-type: none">One strong physician leader, one or more fellow or attending leadersRecognized as local or national leader in therapyLeading physician speakingAbstracts, or posters, or studiesWriting articlesWebinarsProtocol makes therapy safe, effective, and easy for physicians and nurses.



Launching New Products

Best Marketing and
Sales Practices



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Creating Raving Fans Example: **Nurses**

Customer Development Assessment

Customer	Stage 1 Beginner	Stage 2 Intermediate	Stage 3 Advanced
Nurse leadership	<ul style="list-style-type: none"> • One leader • Train nurses on therapy and product with support • Address resistance to upgrading the new product • Only using training tools from the company 	<ul style="list-style-type: none"> • One leader recognized as therapy and product expert in the hospital • One super-user per department per shift • Planning to write, speak, or do studies • Require company's help two times per year or less to train nurse trainers • Interested in upgrading to the new system • Using super-users and hospital-specific tools to train 	<ul style="list-style-type: none"> • References source for testimonials—verbal or written—and on-site visits • Clear guidelines for use of therapy and products • One leader recognized as expert locally, regionally, or nationally • Two or more super-users per department per shift • Published or writing posters, abstracts, or articles • Speaking on therapy or product • Implementing studies.



Launching New Products

Best Marketing and
Sales Practices



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Creating Raving Fans Example: **Nurses** (continued)

Customer Development Assessment

Customer	Stage 1 Beginner	Stage 2 Intermediate	Stage 3 Advanced
Nurse leadership		<ul style="list-style-type: none">Periodically using run summaries from machines to assess and upgrade trainingDepartments collaborate to implement the therapy	<ul style="list-style-type: none">Participant in webinar or e-newsletterSelf-sufficient nurse trainingUnit-based educators in each departmentReference source for testimonials—verbal or written—and on-site visitsA leader in using super-users and hospital-specific tools such as cards, emails, posters, laminated remindersSystematically using run summaries from machines to upgrade trainingDepartment demonstrates excellent collaboration to improve the therapy



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8. Aligned motivation

- **Salary:** Fixed sum of money paid at regular intervals.
- **Commission:** payment made based on the value and specific amount of sales achieved.
- **Bonus:** payment made at the discretion of upper-management for achieving some goal or going beyond the initial set of standards.
- **Contests:** motivational based selling structure that rewards salesperson's that exceed their quotas or attracts the highest number of new customers. Sales contests can be individual or team oriented.
- **Benefits:** typical pay structure in any compensation plan. Benefits include medical and disability insurance, retirement plan, dental, free meals, etc...
- **Non-Financial Rewards:** Non-financial rewards offer employees opportunities for promotion or recognition such as rep of the month, task forces, input to company activities, and professional development opportunities.

NOTE: Bosses behaviors to help the sales person succeed are a dominant non-financial reward. Management/leadership attention matters.

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8. Aligned motivation

Pipeline: The Ultimate Metric



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8. Aligned motivation

Pipeline: **Key Inputs**

Datapoints:

- Rep Name
- Month (or week)
- Account Name
- # or \$
- % probability. % has objective criteria (see below)
- Adjusted probability (calculated, # x % = adjusted #)

Objective Pipeline Percent definitions

(Note: there are 3 decision-making groups: MD, RN, Admin)

- 50% = 2 of 3 decision-maker groups say “we will buy from NxStage”
- 75% = all 3 decision-maker groups say “we will buy from NxStage”
- 90% = and stated date for when they will send us the purchase order

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8. Aligned motivation

Pipeline

2009	April	#	%	Adjusted
Region				
Midwest (Kammes)				
	U of Cincinnati (Alliance) 3 & 6 renta	3	90%	2.7
	St. Luke's Milwaukee	10	75%	7.5

Objective Pipeline Percent definitions

(Note: there are 3 decision-making groups: MD, RN, Admin)

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- 75% = all 3 decision-maker groups say “we will buy from NxStage”
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Pipeline

2009	April	#	%	Adjusted
Region				
Midwest (Kammes)				
	U of Cincinnati (Alliance) 3 & 6 rental	3	90%	2.7
	St. Luke's Milwaukee	10	75%	7.5
West (Russell)	St. Luke's Houston (rental)	15	75%	11.3
	DVA Mission	4	50%	2.0
	Kaiser Santa Clara	3	50%	1.5
	Liberty Boise	2	90%	1.8
Northeast (Barros)	Methodist Brooklyn	5	75%	3.8
Mid-Atlantic (Pettigrew)				
Southeast (Padlo)	Forsyth	7	90%	6.3
Monthly Potential		49		37

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8. Aligned motivation

Pipeline

2009	April	#	%	Adjusted
Region				
Midwest (Kammes)				
	U of Cincinnati (Alliance) 3 & 6 rental	3	90%	2.7
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West (Russell)	St. Luke's Houston (rental)	15	75%	11.3
	DVA Mission	4	50%	2.0
	Kaiser Santa Clara	3	50%	1.5
	Liberty Boise	2	90%	1.8
Northeast (Barros)	Methodist Brooklyn	5	75%	3.8
Mid-Atlantic (Pettigrew)				
Southeast (Padlo)	Forsyth	7	90%	6.3
Monthly Potential		49		37
Cumulative for Quarter		49		37
Month				
Sold or estimated				37
Budget				11
Variance				26
Cumulative for Quarter				
Sold or estimated				37
Budget				11
Variance				26

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8. Aligned motivation

Pipeline

2009 Region	January	#	%	Adjusted	February	#	%	Adjusted	March	#	%	Adjusted
Midwest (Kammes)	Aultman	3	50%	1.5	Christ Hospita	6	50%	3.0	McLaren, Flint MI	4	50%	2.0
	U of Cincinnati	3	90%	2.7	St. Thomas, M	5	50%	2.5	Illinois Masonic	2	75%	1.5
	CCF	5	75%	3.75	VA Lexington	2	50%	1.0				
	Freeman Joplin	3	75%	2.25								
	St. John Health	2	50%	1								
	Munson Dialys	1	100%	1								
	Jewish Hospital	4	75%	3								
Vanderbilt	6	50%	3									
West (Russell)	Banner Dessert	1	75%	0.8	DVA Mission	4	75%	3.0	St. Joseph Orange	8	50%	4.0
	DVA Cedar Sina	4	50%	2.0	VA Pugent Sc	2	75%	1.5	Orange Coast	2	50%	1.0
	DVA Las Vegas	10	75%	7.5								
South (Dowd)	Baylor Heart (cc	2	75%	1.5	Parkland	4	50%	2				
	Denton Regiona	2	50%	1.0	Shannon Clin	2	50%	1				
	LSU Shreveport	4	75%	3.0								
	St. Luke's Hous	8	75%	6.0								
Northeast (Open)	St. Joe's NH	3	50%	1.5	MGH	8	50%	4	Medstar Washingc	4	10%	0.4
	DVA Boston Me	8	50%	4.0	DVA - Yale	15	50%	7.5	Geisinger	1	90%	
	Baystate	2	50%	1.0	Westchester	10	50%	5	DVA- BMC	8	25%	2
					Frederick Mei	2	75%	1.5	UMass	5	75%	3.8
Mid-Atlantic (Pettigrew)	Sibley Memorial	1	90%	0.9	WVU Ruby	2	75%	1.5	Sinai Baltimore	4	50%	2.0
					Meridian Hea	2	75%	1.5	Virtua Health Marl	2	75%	1.5
					Meridian Hea	4	50%	2.0	Virtua Health Vorhe	2	50%	1.0
					Meridian Hea	2	50%	1.0	Medstar Georgetov	8	75%	6.0
					Altoona Regio	3	50%	1.5	Other Medstar	6	50%	3.0
Southeast (Padlo)	Roper	3	50%	1.5	DVA Miami	8	50%	4.0				
	Emory	3	50%	1.5								
	Atlanta Medical	1	50%	0.5								
Monthly Potential		79		33		81		37		56		25
Cumulative for Quarter		79		33		160		70		216		94
Month												
Sold or estimated				33				37				24.7
Budget				15				15				35
Variance				18				22				(10)
Cumulative for Quarter												
Sold or estimated				33				70				94
Budget				15				30				65
Variance				18				40				29

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8. Aligned motivation

Weekly Sales Metrics

METRIC	<u>GOAL</u>		
	Per AE	Per PMD	Adele Houston
No. Dermaceutic Spot Peel demos	3	36	5
No. Dermaceutic Milk Peel demos	2	24	0
No. Dermaceutic demo forms submitted	5	60	5
Dermaceutic POs from new accounts	1	12	0
Celfix POs from new accounts	1	12	0
Relastin POs from new accounts	1	12	0
Dermachromatic POs from new accounts	1	12	2
Enough stock/demo product inventory	Yes	Yes	Yes



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8. Aligned motivation

Golden Metric High Correlation with Increasing Sales

METRIC	Adele	Alexis	Barret	Brent
No. Dermaceutic Spot peel demos	61	50	44	27
No. Dermaceutic Milk peel demos	3	1	10	8
No. Dermaceutic peel demos (5/21-6/16/12)	20	16	17	9
No. Dermaceutic demo forms submitted	65	48	45	17
Dermaceutic POs from new accounts	8	12	20	8
Celfix POs from new accounts	3	2	7	5
Relastin POs from new accounts	6	2	8	5
Dermachromatic POs from new accounts	3	0	0	0



Required customer to:

- trust rep
- commit to a demo
- select a patient
- report results

METRIC	ACCOUNT EXECUTIVES - YTD														
	Adele	Alexis	Barret	Brent	David	Jeff	Lindsay	Melissa	Nick	Robbyn	Open	Open	Stephanie	Tracie	Company
No. Dermaceutic Spot peel demos	61	50	44	27	55	10	23	39	44	24	21	40	40	50	528
No. Dermaceutic Milk peel demos	3	1	10	8	4	0	8	9	18	4	7	14	27	3	116
No. Dermaceutic peel demos (5/21-6/16/12)	20	16	17	9	13	0	0	23	13	13	12	28	21	0	185
No. Dermaceutic demo forms submitted	65	48	45	17	56	12	25	54	57	26	52	54	44	53	608
Dermaceutic POs from new accounts	8	12	20	8	14	1	1	4	17	6	6	8	8	5	118
Celfix POs from new accounts	3	2	7	5	10	0	2	1	11	11	2	2	9	5	70
Relastin POs from new accounts	6	2	8	5	13	0	3	4	15	8	2	0	10	3	79
Dermachromatic POs from new accounts	3	0	0	0	1	0	0	1	3	2	0	0	0	1	11



LEAD YOUR DIRECT REPORTS

8. Aligned motivation

Pipeline/CRM systems

- Pipedrive
- Zoho
- bpm'online
- Salesforce
- Hubspot for SASS companies
- Capsule
- Highrise
- Insightly
- Instream
- Less Annoying CRM
- Nimble
- OnePageCRM

<https://blog.capterra.com/9-cheap-salesforce-alternatives-make-crm-simple-amazon-com/>



LEAD YOUR DIRECT REPORTS

8. Aligned motivation

Common compensation, reward and recognition challenges:

- Program is simple and clearly understood
- Payouts are easy to calculate
- Belief that payouts and recognition can be achieved
- Belief that the company will help you attain the payouts
- Issues of fairness due to territory differences such as accessible market, competitive intensity, local market conditions, sales rep time in territory, etc.

LEAD YOUR DIRECT REPORTS

8. Aligned motivation

Sales Contest Checklist

- Involve sales people in the planning process
- Simple, objective metrics
- Metrics are easy to measure and report daily, weekly, and monthly
- Motivates behaviors that improve sales performance
- High likelihood that all salespeople could earn a reward
- Meaningful, exciting incentives
- A fun theme and process tailored to your team
- Company support and follow through of the contest event(s)



LEAD YOUR DIRECT REPORTS

8. Aligned motivation

Additional Ideas

Metrics:

- Sales and Accounts by time/territory/account type/new
- Profits
- Documented demonstrations/month
- Fastest to monthly quota
- Fullest pipeline (with objective pipeline %'s)
- Best customer retention and/or feedback Most trade show leads/sales
- Meetings with "A" target accounts
- Fastest sales cycle
- Most new accounts
- New product sales
- Cross-sales and Up-Sales

Rewards: Gifts:

- Cash
- Trips
- Name on plaques
- Trophies
- Certificates
- Tickets to events (sporting, music, performance)

Teams: Sales person with related personnel (customer service, marketing, etc.)



TEN CHARACTERISTICS OF HIGH PERFORMING SALES MANAGERS

Module	Characteristic
1. Lead Yourself	<ol style="list-style-type: none"> 1. Consistent, relentless passion for your purpose 2. Articulate a career strategy 3. Need more customer knowledge: deepen and broaden relationships
2. Lead Your Direct Reports	<ol style="list-style-type: none"> 4. Design and live your championship culture 5. Obsess on objectives and sales process 6. Inspired recruiting, selecting, and hiring 7. Train, onboard, coach, develop, and terminate 8. Aligned motivation and compensation
3. Lead Your Organization	<ol style="list-style-type: none"> 9. Link colleagues to your sales team and enterprise customers 10. “Lead up” to increase your organization’s performance



LEAD YOUR ORGANIZATION

9. Link colleagues to your sales team and enterprise customers

Sales reps benefit from relationships with . . .

- **Sales Training**—just-in-time help
- **Customer Service**—help them understand your customers
- **Marketing**—clarity on product issues
- **Finance**—expense reports, commissions, etc.
- **Human Resources**—benefits, etc.
- **Research and Development**—understand depth of the company's expertise

LEAD YOUR ORGANIZATION

9. Link colleagues to your sales team and enterprise customers

- **Value of linking your colleagues with customers**
 - **To the colleagues:** share their expertise, learn more about customer needs, learn about sales challenges and approaches
 - **To the customers:** gain more company expertise, improve perception of and trust in the company
 - **To the sales rep:** develop relationship with colleagues, become more of a trusted advisor to your customer
- **How to link your colleagues with customers . . .**
 - Sales Training
 - Marketing
 - Customer Service
 - Finance
 - Human Resources
 - Research and Development
 - Other Customers

LEAD YOUR ORGANIZATION

10. “Lead up” to increase your organization’s performance

Considerations about leading up...

- **Do your job well**—lead yourself and your direct reports
- **Make it easy for your boss** to help you by tailoring information and style to his/her preferences
- **Ask your boss what else you can do** to help her/him
- **Ask your boss for advice, to be a mentor**
- **Develop relationships** with many superiors and peers in your organization
- **Maintain a can-do attitude**
- **Use persuasion techniques** (e.g., the more your boss talks, the more he/she will like you and the more you learn)
- **Manage things that irritate you**

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CAN DO IT ALL!

THE PERSUASION EQUATION

The 10 Persuasion Equation Questions: **Experiential Exercise**

1. Please tell me about the situation.
2. **Exactly** what is not working for you?
3. **Roughly** how much are you losing now?
4. **So**, can you put a number on that?
5. **Under** the current circumstances what happens if this continues?
6. **Approximately** how much better is your competition doing?
7. **Since** we want a solution,
 - *If you have flexibility:* can you describe a compelling vision of the future?
 - *If you do not have flexibility:* may I describe a compelling vision of the future?
8. In your opinion what would it look like and how would you feel if these losses stopped?
9. **Off** the top of your head, if this solution works for you how much does it increase your revenue, decrease your costs or time and/or improve your quality of life?
10. **Now** tell me how would you feel if the following solution worked? May I share with you the easy steps to get there?



THE SALES MANAGER SWOT AND DICE EXERCISE

Strengths – Weaknesses – Opportunities – Threats

Decrease – Increase – Create - Eliminate



MASTERMIND GROUPS

What is a real challenge you cannot figure out?



THE PERSUASION EQUATION

The Persuasion Equation:



Step 1. Dissatisfied with today, **PLUS**

Step 2. Compelling vision of the future, **PLUS**

Step 3. Easy steps to attain the vision **EQUALS**

Effective, Lasting Change



THE 10 PERSUASION QUESTIONS

The 10 Persuasion Questions Experiential Exercise

1. Please tell me about the situation.

Just sit back and listen. Don't interrupt. Let them talk. People love to be heard. Pause for 5+ seconds after the client has finished before speaking.

2. Exactly what is not working for you?

Listen again. This is the client telling you their need, their pain point, what is "keeping them up at night". This is what they really want fixed. They will spend money to fix their most urgent and important problem. Continue to ask, "Could you please tell me more?" until you fully understand and paraphrase back to your customer to revise your understanding if needed, and show that you understood.

3. Roughly how much are you losing now?

It is important to search for tangible loss. Get the client to talk about what is being lost: sales lost, employees lost, opportunity lost. You may need to brainstorm with them here. Loss will prime your client to be willing to change because they see more damage is being cause now.



THE 10 PERSUASION QUESTIONS

The 10 Persuasion Questions **Experiential Exercise** (continued)

4. **So, can you put a number on that?**

Get the client to estimate how many dollars are being lost, how many sales are being lost, how many employees are leaving, how many weeks or months of time can be saved. Whatever the loss is, help your client quantify it into a number. This will prime them into seeing the urgency of changing now.

5. **Under the current circumstances what happens if this continues?**

This gives your client the opportunity that deciding to do nothing has negative consequences. By pointing out that indecision doesn't stop the problem, rather the problem grows and will help the client to see that procrastination is not a good choice.



THE 10 PERSUASION QUESTIONS

The 10 Persuasion Questions **Experiential Exercise** (continued)

6. **Approximately how much better is your competition doing?**

This question cannot be asked in every situation because it can be sensitive. If appropriate to ask, this can create jealousy and envy in your client. This is another incentive for them to embrace change and also adds a time to it. It adds urgency to the need to change. Alternatively, you can ask if the client would like to hear your use cases and success stories and achieve similar results.

Before going on to 7...

- Do you have flexibility in how you can help?
- Consultant, coach, or designer?

For consultants, after 6 and before 7 ask client:

- **“Can you (the client) describe what your ideal vision of the future looks like?”**

Then go on to 7 and share **how close** you can get to it.



THE 10 PERSUASION QUESTIONS

The 10 Persuasion Questions Experiential Exercise (continued)

7. Since we want a solution, **can you/may I** describe a compelling vision of the future?

NOW it is your turn to talk.

You have enough information about the problem to create a suggestion for their consideration. Toss out your idea in a brainstorming format. Ask your client to take your idea as a starting point and make it better.

You can ask them to **D-I-C-E** your ideas.

- What part of the idea would they **Decrease** or **Increase**?
- What idea would they **Create** to add to the compelling vision and what would they **Eliminate**?

You can D-I-C-E in the form of questions: “What if you decreased...” or “What would you say to decreasing...”

This level of brainstorming allows the client to create their own vision of the future. And since they created it, they will agree with it. You are simply facilitating it. If you are clear on what you want to ask, “What if...” or “How would you like to see...” to lead into your custom-made vision tailored to meet the client’s needs.



THE 10 PERSUASION QUESTIONS

The 10 Persuasion Questions **Experiential Exercise** (continued)

8. In your opinion what would it look like and how would you feel if these losses stopped?

This question allows your client to start to describe their satisfaction with your solution and feel the positive emotions of what happens when things start to turn around for the better. This creates hope and positive energy and gets them to move toward the solution.

9. Off the top of your head, if this solution works for you how much does it increase your revenue, decrease your costs or time and/or improve your quality of life?

These are three ways to add value to your clients' life and give them a chance to specifically articulate where exactly they expect to get added value. This also shows you what the client is thinking and gives you a chance to emphasize other items if it helps the client purchase faster or make the purchase bigger.



THE 10 PERSUASION QUESTIONS

The 10 Persuasion Questions **Experiential Exercise** (continued)

8. Now tell me how would you feel if the following solution worked? May I share with you the easy steps to get there?

Ask about feelings. People buy on emotions and justify with facts. By asking a question about how good they feel with a solution will prime them to be open to your suggestions. Now is your opportunity to briefly list the easy steps to start implementing, and ask, “Can you see that all we need to do are these easy steps to start moving forward – 1, 2, 3?” If your client agrees to the added value of your solution, then you can ask, “When would you like to start enjoying these benefits?” or “Would you like to move forward now?”



THE 10 PERSUASION QUESTIONS

The 10 Persuasion Questions Experiential Exercise

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