



Increase Your Team's Sales Effectiveness

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Want the most effective and profitable sales team? Periodic performance reviews are your keys to success. But, those reviews need to consider a wide range of issues that could be affecting performance.

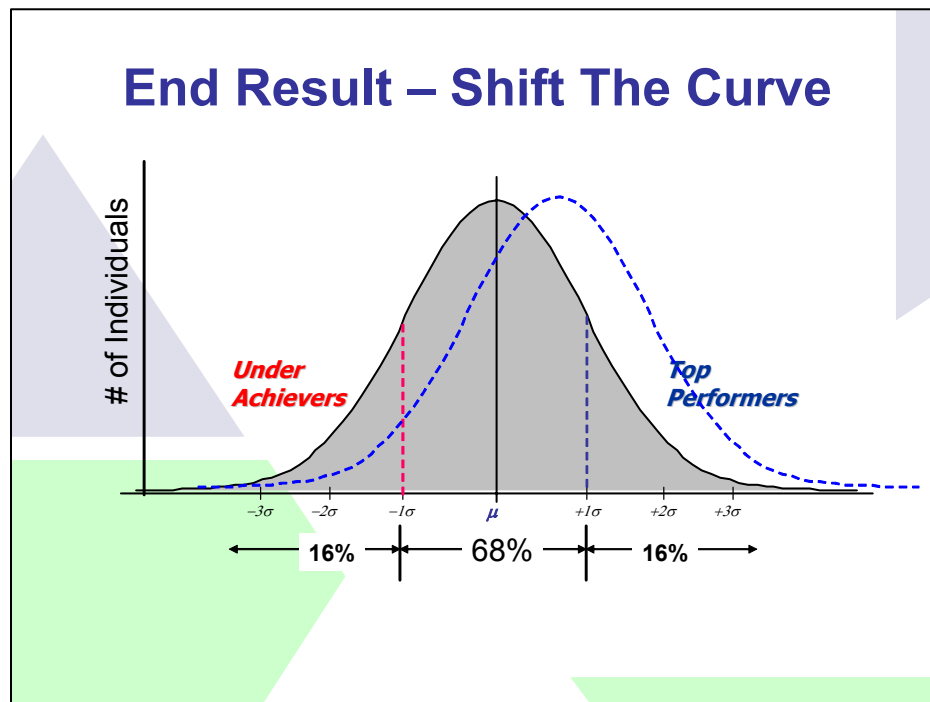
- What is the current selling environment for the product?
- What is the emphasis on price versus value?
- How is the competition stronger or more aggressive?
- What internal challenges are affecting performance?
- How do the skills and competencies of the individual team members compare and contribute to the success of the whole?

Although it may seem daunting at first, a sales tune-up plan can make team performance more consistent and reliable, while giving team members the support they need to ensure increased and continued success.

Addressing Underperformance

According to the historic Pareto Principle, 80 percent of a business is driven by 20 percent of its sales team. The top performers consistently go above and beyond sales goals, while 60 percent of the team typically achieves adequate sales results. The remaining 20 percent consistently underperforms.

So, how do you shift the curve to the right?



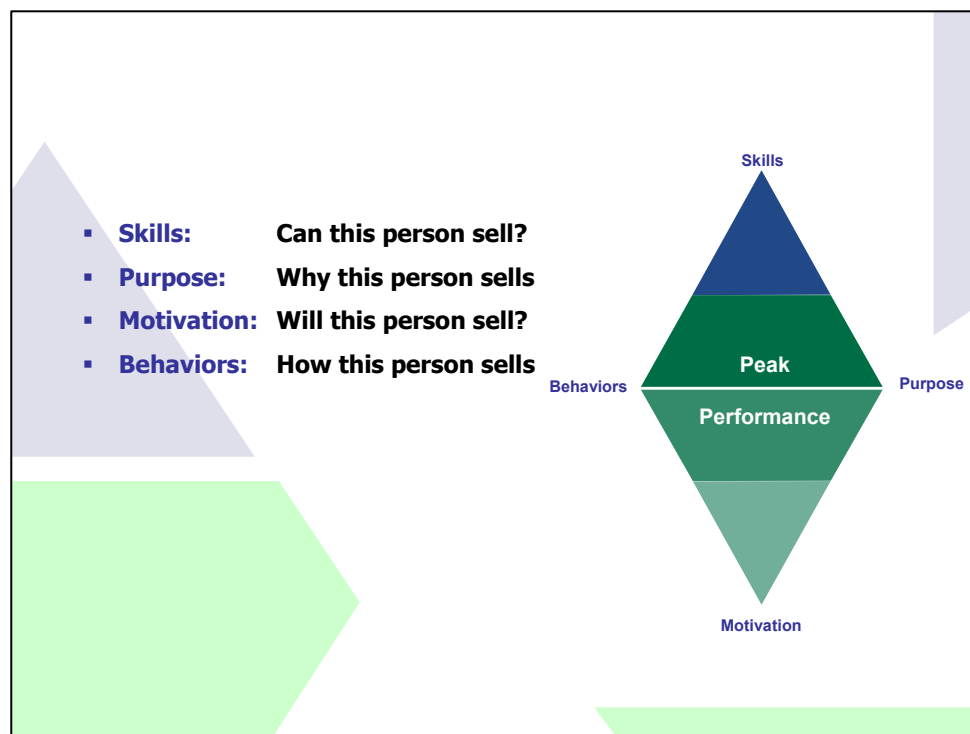
Invest in More than Training Tools

Over the years, many businesses have tried to shift the curve by investing in the latest and greatest sales training methodology. Unfortunately, this solution has left one important question unanswered: If everyone is trained with the same methodology and has the same experiences, why are some sales representatives and teams still more effective than others?

Consider the Parts of the Whole

The solution? Companies need to do more than just implement the “right” methodology. They need to find a way to ensure the training has the stickiness to make a difference. Consider the following:

- Have the members of your team consistently proven that they have the required sales skills?
- What are team members' reasons for selling the product or service?
- What are the motivations that encourage each member to meet or exceed expected sales?
- What are the methods that each team member employs to sell the product or service?

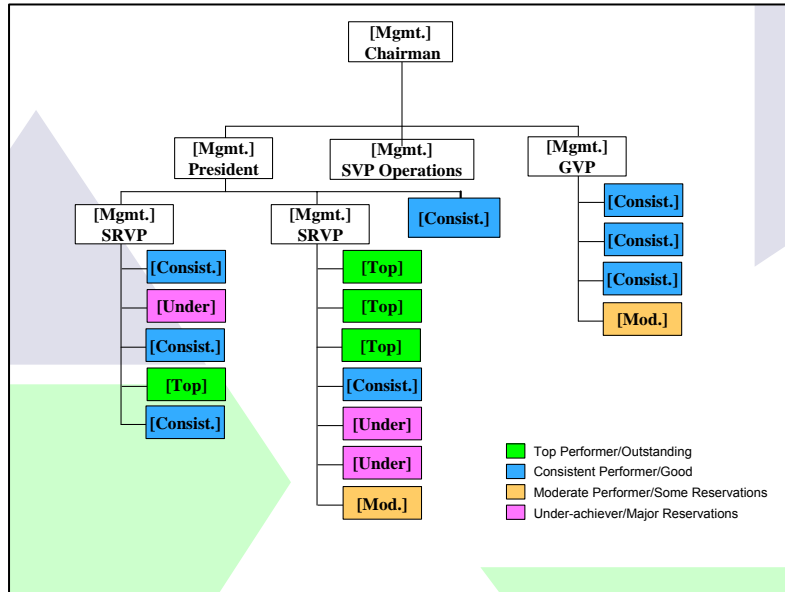


The truth of the matter is: Most sales teams can improve performance, but it involves far more than simply investing in the right tools and providing basic individual and team training. In fact, difficult decisions must be made, including whether or not you should continue investing in particular sales associates that underperform.

Create a Performance Map

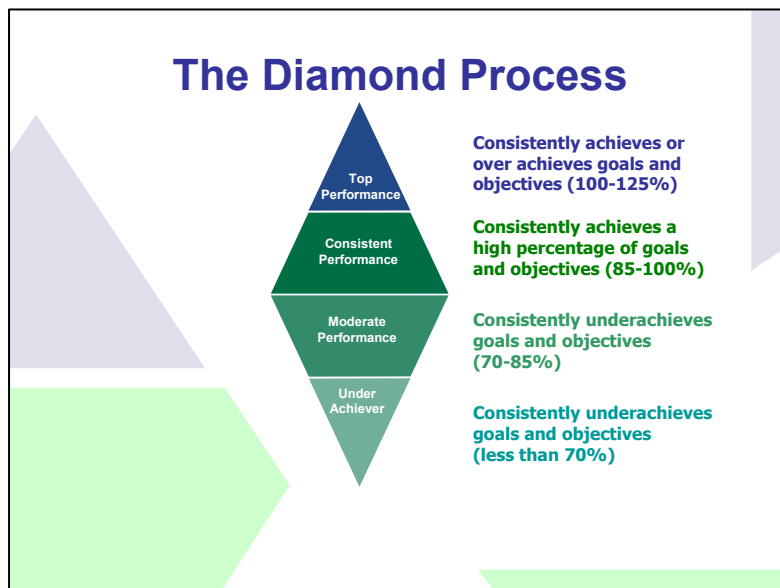
One of the first steps you can take is to create a team performance map, as demonstrated in the following graphic.

Once you've targeted the areas of your team that need improvement, you can move on to step two: bucketing performance.



Bucket Performance

The purpose of bucketing past performance is to establish an initial baseline for improvement. First, you must have a consistent definition of past performance. The following diagram visually demonstrates a human capital balance sheet, based on "Top," "Consistent," "Moderate," and "Under Achiever" performance. Note: The more historical data you can reference to support your model, the more effective this exercise will be.



Reviewing Individual Performance

Individual Assessments

Individual assessments help determine areas of strengths and weaknesses in an individual's approach to selling. To begin, you must evaluate the individual's skills as they relate to specific competencies required, given your current selling process. Then, you must assess the key attributes of your top performers and see how the other individuals on the team compare.

Individual assessments will help you understand why particular members of your sales team are performing in certain ways, as compared to the other parts of the whole. Classroom and field coaching observation will provide further insight into the comparative skills and performance of team members.

Readiness for Improvement

Next, evaluate the person's readiness for improvement. Typically, individual's fall into one of four stages:

- Oblivious
- Contemplative
- Prepared
- Active

The first type of individual is oblivious to not only his or her underperformance, but also to the problems creating those performance results. A contemplative individual recognizes the need for improvement, but substitutes thinking for action. On the other hand, a prepared individual has begun to focus on the solution and the development of a plan. (Many times prepared individuals have been propelled to this heightened stage by an event, such as being put on a performance plan.) Finally, with active individuals, visible change has already begun. The individual embraces the plan and starts practicing the expected behavior.

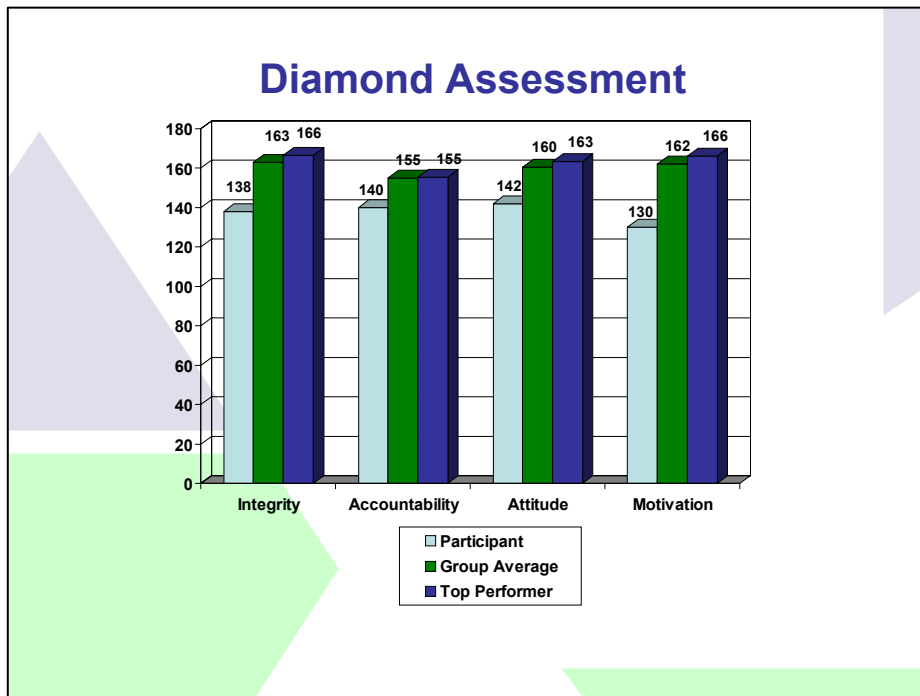
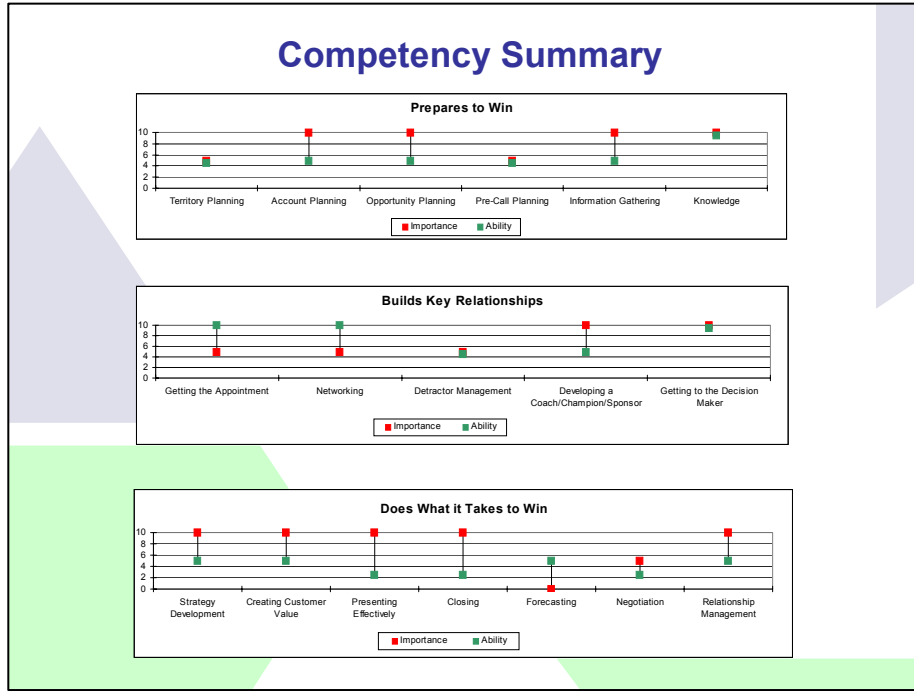
Commitment and Decisions

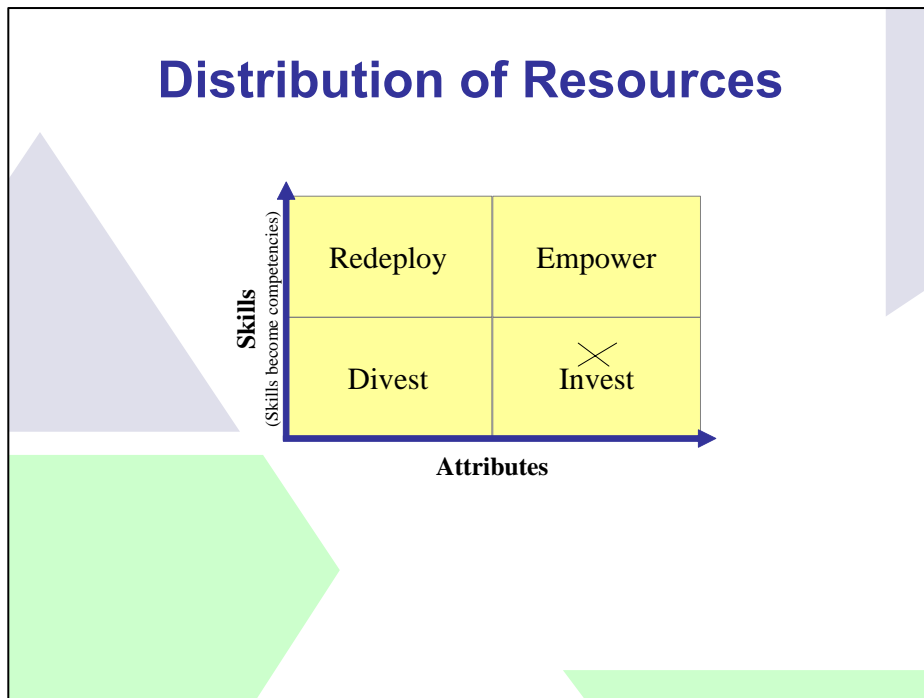
Before you invest in further training, you also need to consider the commitment of the individuals on your team, as it relates to what you perceive as their readiness for improvement. Once that is determined, you need to make your next decision:

- Empower?
- Invest?
- Redeploy?
- Divest?

You should empower someone who consistently meets or exceeds your performance expectations, and they may or may not elect to invest in additional development. Basically, give this individual the support they want and stay out of their way. You should invest in someone who demonstrates the right attributes and is open to coaching, but who needs a more effective roadmap to improve their performance.

Redeploy individuals who are valuable to the organization, but who may not have the aptitude to contribute in the role they currently occupy. You should divest if it is obvious that an individual has neither the attributes nor aptitude for their current role.





Utilizing the Right Tools

Now that you've considered your team members' skills and readiness for improvement, you need the tools to help you most effectively:

- Plan your territory.
- Assess opportunities. (Is it good business? Can you "win"?)
- Create customer value. (In many cases, this occurs in the presentation stage.)
- Demonstrate proper due diligence.
- Increase your sales team's chances of success.

The tools we've developed at Diamond Performance Group thoroughly address each of these issues. Designed to be quick, simple, and user-friendly, these efficient resources can be easily integrated into any sales automation software.

[COMPANY]

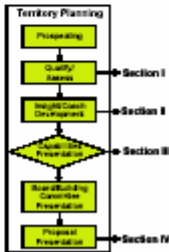
OPPORTUNITY PLANNER

How to Use This Opportunity Planner

- You can type your information into the file. The box where you type will expand to include as much information as you need. To move to the next box, press **Tab**.
- For Yes/No answers, tick to checkbox and press spacebar or type an "x" in box.
- In the Table of Contents, whenever you see a phrase underlined and in blue text, you can **CTRL + click** on it to go directly to that section.
- To return to the beginning of the file at any time, press **CTRL + Home**.

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- [Section II: Opportunity/Research Plan](#)
- [Section III: Provisional Preparation Checklist](#)
- [Section IV: Solution Requirements \(Data Pack\)](#)



SECTION I: QUALIFICATION/ASSESSMENT

| | |
|-------------------------|---------------|
| Good Business (-5-42) | Account Score |
| Can We Win (-27-47) | |
| Overall Total (-27-109) | |



GOOD BUSINESS

Value to Customer (0-15)

- Customer sees the benefit you provide in the customer's product
- The customer sees the value of your product
- The account has a clear understanding of the project objectives
- The customer's perception of the fit is consistent with our ability to deliver
- Company is a superior fit vs. our competition and the account knows it

| Value | Account Score |
|-------------------------------------|---------------|
| 1 | |
| 4 | |
| 4 | |
| 4 | |
| 4 | |
| 2 | |
| Subtotal - Value to Customer | 0-15 |

Customer Urgency (0-15)

- There is a sense of urgency-decision within 90 days
- The need is there, but the project must be re-prioritized
- The account has approved a budget adequate to complete the project program
- The project/program is a top priority with senior management
- The account must acquire land before a building project can proceed
- Senior management recognizes the value of Company's solution/product

| Value | Account Score |
|-----------------------------------|---------------|
| 4 | |
| 3 | |
| 3 | |
| 4 | |
| -5 | |
| 4 | |
| Subtotal - Account Urgency | -5-15 |

SECTION I: QUALIFICATION/ASSESSMENT

Value to Company (0-25)

- The account views Company as a long-term strategic partner
- You have presented the Company offering to senior management/board
- The account has done business with Company in last five years
- Revenue potential over the next 3-5 years:
 - < \$500,000
 - \$500,000-1 million
 - \$1 Million plus
- Fee Structure:
 - Full Fees Higher than 40% Gross Margin
 - 10% Reduction in standard fee
 - 20% Reduction in fee
 - Heavily discounted fees required to secure business
- Strategic importance of account- see they a high profile company/management team at the state or national level

| Value | Account Score |
|------------------------------------|---------------|
| 4 | |
| 3 | |
| 4 | |
| 4 | |
| 0 | |
| 3 | |
| 3 | |
| 2 | |
| 3 | |
| 3 | |
| -4 | |
| 3 | |
| Subtotal - Value to Company | -6-29 |
| Total - Good Business | -5-42 |

CAN WE WIN

Strength of Supporters (-4-15)

- You have no inside coach at this account
- Your contacts are open to sharing business market information and they are amenable and willing to meet the Company strategy team to discuss the project strategy
- Your supporters are positioned at high and low levels of management and across key functional departments
- Your supporters will help you identify other opportunities to cross-sell other Company products/services
- Your supporters are open to scheduling meetings for you the at senior management level
- Your supporters want you to win the business and have recommended Company as their preferred partner to senior management
- NG will be able to present our final proposal to the decision making team
- You have made a capabilities presentation to the account decision team
- Company has other clients that have influence within the account

| Value | Account Score |
|--|---------------|
| -4 | |
| 3 | |
| 3 | |
| 3 | |
| 3 | |
| 3 | |
| 3 | |
| 3 | |
| 3 | |
| 3 | |
| Subtotal - Strength of Supporters | -4-12 |

SECTION I: QUALIFICATION/ASSESSMENT

Strength of Detractors (-25-0)

- You have detractors in the account
- The account is unwilling to share information
- You have a detractor that overly limits who you see in the account and is focused only on price and bias control of your activities
- The account has a local architect or general contractor that has a strong relationship or is on the board of directors
- You have a detractor who is highly influential
- Account has strong relationship with a competitor
- Primary account contacts display little loyalty to supplier

| Value | Account Score |
|--|---------------|
| -3 | |
| -2 | |
| -5 | |
| -5 | |
| -5 | |
| -3 | |
| -4 | |
| Subtotal - Strength of Detractors | -25-0 |

Critical Customer Insight (0-25)

- You have identified the key members of the decision making team and you are aware of each of their objectives as it relates to the account
- You understand the decision criteria at the corporate and departmental level
- You understand the current projects and their priority both at the board and departmental levels
- You understand the project objectives, issues and challenges and you have confirmed those objectives with the decision team at the account
- The account places a higher priority on value over price
- Do you clearly understand the decision making process

| Value | Account Score |
|---|---------------|
| 4 | |
| 4 | |
| 4 | |
| 4 | |
| 3 | |
| Subtotal - Critical Customer Insight | 0-25 |
| Total Can We Win | -27-47 |

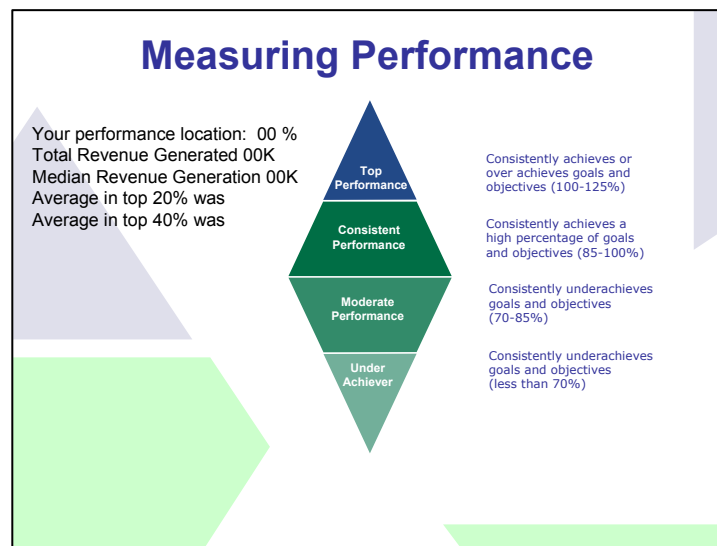
Assessing the Sales Process

By defining your sales process, you can better understand the successes and failures of your sales team. Take a closer look at quantifiable events, for example, like the conceptual presentation to senior management. This allows you to begin with assumptions around specific percentages and put effective territory plans in place, with key activities and metrics around quantifiable events.

It should be noted, however, that some sales professionals may execute certain steps in the process more effectively than others. Therefore, you also need to review overall sales effectiveness as it relates to the successes of the individual members of your team over time.

It's also a great idea to create a "scorecard" to drive the right level of activity. This scorecard should take into account:

- Lagging indicators: Failure to reach quotas and the reasons behind it.
- Leading indicators: Those activity's that enhance a sales team's chances of making individual quotas, leading to pipeline growth and movement.



Quarterly Sales Scorecard

| <i>Weighting</i> | <i>Category</i> | <i>Points Possible</i> | <i>Actual Points</i> |
|------------------|---|------------------------|----------------------|
| 50% | Sales Results – relative to sales goal; as measured by contracts executed | 50 | |
| 25% | Pipeline Management – conceptual presentations conducted for both physical medicine and myRenewell sales opportunities | 25 | |
| 25% | Sales Effectiveness – moving sales opportunities to closure, as measured by data pulls and solution presentations | 25% | |
| 100% | | 100 | |

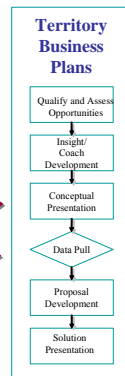
Qualitative Performance Indicators

- Prospect pipeline
 - *Depth*
 - *Breadth*
 - *Data integrity (accuracy)*
- Utilization of Territory Business Plan
 - *How well are you penetrating your geographic territory?*
- Sales Team Projects
 - *Leadership*
 - *Participation*
- Individual Development Plan
 - *Progress toward developmental opportunities*

Measuring Key Steps in Sales Process

Activity targets: 2 Physical Medicine + 2 myRenewell conceptual presentations per month, or 6 per quarter

Measure activities which will drive sales results



Common template used to develop territory coverage expectations

Assumption – 50% of conceptual presentations move to data pulls, and 50% of data pulls result in new sales

Training

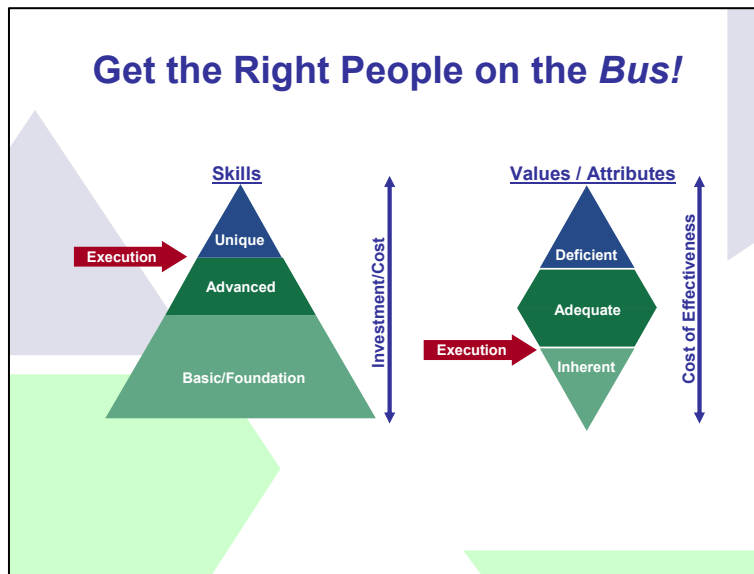
Unfortunately, most sales professionals feel good about the training they receive, but often lack the ability to effectively execute in the field. Usually, the individuals who need the most improvement stay stuck in their old paradigm, while the top performers adopt the new skills and strategies.

At Diamond Performance Group, we've helped companies successfully combat this phenomenon, resulting in consistently high-performing sales teams.

The first step we see in creating change in the classroom environment is to create awareness for the need for change. We do that by distributing individual development plans that include the sales professional's skills assessment and past performance information. We also help everyone understand how difficult it is to change and that it's a process that evolves over time.

Then, we break the individuals into predetermined groups of three to help drive some accountability and to develop an element of trust through honest feedback. Team members are then asked tough questions regarding their own attributes as they relate to integrity, accountability, attitude, and motivation.

We also know that management plays a critical role in driving increased performance, so we spend considerable time with the management team prior to any work in the classroom, focusing on critical success factors.



Developing a Plan

Once you outline and begin implementing your training program, you can put effective development plans in place that consider projected team strengths, areas of focus, and further opportunities for improvement in individual sales approaches. Goal setting and commitment from the individual is a critical component of success in this stage.

Individual Coaching and Follow-up

Finally, you need to provide individual support to help implement and execute on the sales process. This ensures accountability and helps address areas of discomfort (such as old paradigms versus new paradigms) for the members of your team.

Summary

In summary, when the planning is over, and you've put a program in place, success comes down to execution. This is what creates the biggest gap between companies that meet and exceed sales goals and those who underperform.

Commitment by management, your individual sales team members, and your training resources are critical to driving improved performance. If any of these critical players let their guards down, ineffectiveness can take hold. However, if you follow the plan laid out here, everyone involved will be affected and motivated by the resulting success of the team.