

Preparing salespeople to perform exceptionally

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What can I do to prepare my salespeople to perform exceptionally as the market begins to recover? The salespeople I have are good. However, I find they are not always the most organized nor are they the best at reporting on what they're doing. As a small business owner, I'd like to help them to succeed beyond their wildest expectations. What can I do?

There are several things you can do to help your sales people win. Get them resources. Get them organized. Point them in the right direction. Make sure they're clear about what they want. Get out of their way, but check in regularly.

Most sales people are out on the road a lot. Communicating efficiently with the organization while out of the office becomes a challenge. Salespeople can end up going 120 miles an hour, chasing opportunities, jumping from one phone call to the next, driving from appointment to appointment, trying to get to every possible opportunity before prospects go home for the day. Making time by intending to write things down later means that important things can slip.

One solution is to give each salesperson an anchor in the office - someone they can talk to as needed. Some of the "as needed" includes putting notes in files, getting things onto the calendar, getting information out the door to prospects and customers. Every day or two, have that anchor review the sales rep's calendar and forecast. Ask the anchor and sales rep, as a team, to be completely up to date. Get into the calendar all the to-do's that go with appointments and proposal follow up, so that things happen on time.

Give the sales rep efficiency and productivity tools. Tools to have in constant use include a calendaring system, CRM system, forecast system, voice mail, handheld recorder and e-mail. Ask the sales rep to use these tools, and coordinate with their anchor, to keep detailed, up to the minute notes on what's going on.

Recordings and voice mail go to someone to transcribe and take action. The calendar gets reviewed over time to more critically assess what activities produce results and what ones don't. The CRM system is the best place to keep notes on prospects, suspects and clients. Hosting the CRM system on a central server means that everyone who needs to can see what's going on, insuring data isn't lost. Enforcing a weekly review of the forecast means the sales rep is constantly speaking with facts about what's going on. Asking reps to communicate via email and doing the same back provides a trail that helps everyone to be clear about what's expected.

Make sure you or someone else in charge sits down and points each salesperson in the right direction. Line up the company's goals with individual sales goals. Make sure that you're not asking too much or too little of each sales person by comparing this year's goals with last year's actual results. Try to add territories, customers, additional sales products or services to the sales rep's quota, rather than jumping them from one thing to another. Each year should build on the previous one.

When talking with salespeople about company goals and individual responsibilities, make sure you're taking into account what they want personally. Many salespeople perform much better when they're clear how success at work contributes to personal success. Ask them to write out a set of personal goals and line up how success in sales will help them to get what they want.

When it comes to aligning business and personal goals, come to closure within the first quarter of each selling year, if at all possible. Be absolutely certain that each sales rep understands exactly what has to be done to meet or exceed goals. Work it backwards, from amount of sales to number and type of accounts closed, to number of sales calls and prospects to be identified. Help them map this out on a quarterly, monthly and weekly activity plan.

Set up a schedule to check in regularly. More frequent check-in's are preferable. Check in monthly and you have 12 opportunities to correct and plan. Check in weekly and you and your sales rep have 52 chances to get it right. If a rep is off track, be clear and forceful about how to make corrections. Remember most sales reps are used to being self-sufficient, and learning to ask for help to get on track isn't the first place they go. However, helping them get on track helps them to succeed, and insures the company hits its goals for the year.

Looking for a good book? Try "Pro-Active Sales Management: How to Lead, Motivate, and Stay Ahead of the Curve" by William "Skip" Miller.

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O: 914-238-3500. • F: 914-238-2529
AskAndi@StrategyLeaders.com • www.StrategyLeaders.com
Strategy Leaders, Inc. • 5 Crossways, Chappaqua, NY 10514

