

# Sales Operation ‘Checklist’

These are the areas/key items we would expect to see in place in any high performing, well managed, sales operation:

## Sales Planning

The business should have an overall sales plan, which would cover:

- The link to the overall marketing plan – translating this into sales implementation and dynamics
- Revenue targets (broken down into revenue from existing customers and new customers)
- New customer number targets (according to market segment, selection criteria/profiles)
- Targeted product mix (numbers and type)
- Lead sources/options together with strategies for developing each channel and marketing support required
- Outline of projected SalesBase – estimates on total number of new leads required, new prospects, new prime prospects, leading to new customers, including commentary on the overall sales activities (and time required) which will drive those numbers
- Ongoing management information tools which enable the business to track performance in relation to all of the above metrics
- People – overall numbers of salespeople required, structure of the sales team hunters vs. farmers, vertical, sector specialisations, geographical locations etc. Company-wide, sales training and development plans

At an individual salesperson level, **personal sales plans** (PSPs) should be in place, which reflect the above framework. They would include not only that individual's agreed targets, but also the specific quantity, direction and quality (through conversion ratios) of their planned sales activity, as well as their own plans/requirements for personal development. These plans should be completed (usually monthly), owned by the individual and used as the basis for sales management input and coaching.

## People Recruitment and Development

The number of people required and the structure obviously depends on the size of the business and its plans. However, as a rough guide:

- Field based sales operations - 6-7 direct report salespeople maximum for each sales manager (any more than this and it will be impossible for the manager to carry out the necessary field sales coaching)
- Office based sales operations – 10-12 direct report salespeople

Sales people and managers should be recruited for talent, and the business should then have a structured induction and development programme to impart the necessary knowledge (products, internal systems & processes etc.) and constantly develop and improve skills. The latter aspects should be built into each individual's personal sales plan.

## Sales Process

Clearly salespeople need to be capable of finding and developing the necessary number of new leads to feed into their pipeline (ie. leads of the necessary quality – see Selection Criteria below). This may involve training in lead generation (direct approaches, channels, networking etc.)

The whole sales team should be capable of using a structured, professional, consultative selling process when engaging with introducers and customers. This should include the ability to:

- Build early rapport and position the business effectively with new customers
- Ask questions in a structured way to draw out and understand the customer's needs and wants and build value for your solution
- Summarise accurately the customer issues and opportunities
- Present a solution based on the customer situation
- Gain commitment to the next stage of the sales process

Then, having won the customer commitment, sales people must be capable of completing the deal by handling any internal processes/paperwork necessary.

For the higher performers there should be a framework for providing advanced sales development (advanced negotiation, NLP communication and decision making processes, persuasive language structures, non-verbal communication etc.)

## Sales Tools

- **Sales Propositions** – a well analysed suite of selling aides including:
  - ✓ Key bullet points for Positioning Statements
  - ✓ Key Sales Proposition Questions (built around a thorough analysis of your key and differentiating features & advantages) to be asked to build the value (usually in the form of a meeting aide memoire)
  - ✓ Sales Proofs – quality certificates, testimonials etc.
  - ✓ Sales Presentations – outlining key benefits in whatever format is most appropriate for the customers
  - ✓ Sales Contract documentation and other materials which may be required to complete the sale
- **Selection Criteria** – Any successful business will define very clearly exactly what kind of customers, introducers and channels it wants – this should be in a framework which is accessible and easy for all to understand so that salespeople are given clear direction in the marketplace
- **Pipeline Assessment** – Once leads turn into prospects, the business should have a clear sales pipeline process (stages of the sales) and, crucially, a framework for assessing probability
- **Key Account Management** – including, as well as the necessary customer information in a format which is consistent and accessible, tools to assist with relationship assessment/ scoring and actions, decision mapping, SWOT analysis (general and project based)

## Sales Management

Sales managers do not necessarily need to be the best sales people in the team, but they do need to understand the sales process very well indeed and at least be competent in using it themselves (or they will be unable to lead from the front, when required). Equally importantly, they must be capable of coaching their teams and understanding the overall performance metrics (quantity, direction and quality of sales activity), so they can identify and drive any necessary changes in behaviour. Monthly, scheduled 1-2-1 meetings with their key reports, built around that individual's monthly PSP (see above) are an essential element of this role, as are regular joint visits to customers for field coaching. As a rough guide, sales managers should be spending c.60% of their time out in the field joint selling and coaching with their sales people

## Motivation and Values

All of the above key elements must be underpinned by a clear statement of 'why' the business exists and a set of values, from the top of the organisation down which is regularly repeated and a management culture which supports it, if you want to avoid behaviours which could damage the business (note the recent scandals in banking, pharmaceuticals, healthcare etc.). *Doing the right thing for the customer*, and ensuring that the whole sales force is aligned with that value is a principle which has proven to be most effective. Any incentive scheme to encourage achievement of sales targets MUST NOT conflict with, or override that core value.