Getting the Most From Your Sales Team

PROSPERITY PLUS MANAGEMENT CONSULTING, INC.

By Jim Kahrs

Get One-On-One Meetings In On A Weekly Basis and Look, Don't Just Listen

Take Away Points:

- How to create a plan that will lead to more sales production
- Making the routine mean something
- A little discipline today can change the income stream later

Do you wish you could get better consistency from your sales team? Do you think they could work harder or smarter? Are their actual sales often well below their forecast? If you've answered yes to any or all of these questions you're not alone. So, how do you correct these issues?

One of the basic principles of the Hubbard® Management System states "Look Don't Listen." Too often dealer owners and sales managers don't take the time to meet with sales reps to really "see" what they are doing. They simply listen to what the reps "say" they are doing. As a result the reps don't get the coaching they need to improve or the direction they need to make the most of their time. The best strategy for truly looking at what your sales reps are doing is to have a weekly one-on-one meeting with each rep. The balance of this white paper is dedicated to outlining a plan for these one-on-one meetings.

The purpose for conducting a one-on-one meeting with each rep every week is to get an understanding of what they are doing, allow for coaching and direction, to review their pending business, to build strategies for closing deals and to plan out the coming week. The sales rep should come to the meeting prepared to discuss their activities from the past week, their full pipeline of business and their plans for the coming week.

Review of Last Week's Activity

The first purpose for tracking and reviewing activity is to make sure that the rep is doing a viable amount of sales activity. Too often sales reps don't have enough activity to survive. If they aren't getting in front of enough prospects and customers then they will never succeed, no matter how good they are. There is a make / break point here.

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The second purpose for tracking and reviewing activity is to use the results to redirect the sales rep's attention and activities to produce more success. For example, if a sales rep gets poor results from telephone cold calls but tremendous results from in person cold calls you should be able to document and illustrate this from their reports. Once it is understood you can direct them to increase their in person cold calling and/or get them additional telephone training to improve their telephone success rate.

Review weekly activity report - The rep should bring with him/her a report showing their activities for the past week. This report should show the quantity types of activity. The initial goal is to have each rep meeting or exceeding their activity quotas and documenting all activities.

Review the report for accuracy - The sales manager should go through the activity report and verify its accuracy by spot checking it against the rep's calendar. If the report and calendar don't match you need to figure out why. Is the rep simply forgetting to put all activities on the calendar? Is he/she falsifying the report? Are there database problems? Once the inconsistency is diagnosed it can be handled.

Analyze the activity and coach the rep – Simply reviewing the rep's activity isn't enough. The sales manager should be analyzing the activity to see if the rep is getting a good balance of activity and if their ratios of activity are acceptable. For example, if the team averages 1 appointment for every 20 telemarketing calls and 1 rep needs 40 calls to get an appointment the ratio is out of whack. The sales manager needs to dig in and find out why the rep is so far behind the others and provide coaching and training to improve, this holds true for all activities.

Look for over due and undone items on the calendar – One area where reps often struggle is keeping up with calls on their calendar. When reps schedule calls for themselves in the future they often don't make the time to complete them. This can lead to a large backlog of incomplete calls. If a rep is falling into this habit the sales manager must pull them out. Once a backlog of calls starts it is very difficult to dig out of it. There can be some great prospects buried in the backlogged calls that are being missed. If this happens you've lost the true benefit of the CRM software.

Review of the Weekly Sales Recap and Battle Plan

Review the rep's written business month to date – The first step of this section of the meeting is to have the rep review the business they've written and turned in already this month. This is important as it can really set the stage for the rest of the meeting and the rest of the month.

Review the rep's "Take it to the Bank Forecast" – In this section of the meeting the sales manager is looking for the sale rep to give a forecast that can be banked on coming in before the end of the month. This forces the rep to focus on the key deals that are closeable now. When the rep enters a number for a "Take it to the Bank Forecast" the sales manager must go through each deal that is included and strategize with the rep.

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Review each of the Key Deals Pending – This section of the form asks the rep to list out each of their key deals that are pending. Everything from the take it to the bank forecast should be here. There can also be other key deals listed. The purpose of reviewing these is to gauge where the rep is with each deal, offer coaching for closing the deals and to schedule other needed resources like sales manager or owner visits with these accounts. The sales manager needs to review and be comfortable with the next step for each key deal pending.

Review and add to the Battle Plan – In this section of the meeting the sales manager and sales rep should outline the major actions that need to take place in the coming week. At this point of the meeting the manager should also go back to last week's recap and make sure that the battle plan items were all completed.

Review the rep's full forecast – After reviewing the key deals and setting up the basic battle plan for the week the sales manager should briefly review the rep's full forecast. To do this the manager would simply go through the forecast and ask questions about the deals listed to find out where things stand and to see if any help is needed. The sales manager can often find deals in the forecast that can be brought up to the forefront and closed quickly.

Review the Rep's Plan for the Coming Week

Review the rep's *appointments* for the coming week – The sales manager should look at the appointments for the coming week. This will allow for a discussion and plan for each. This review also allows the manager to determine if other people may be needed for any of the appointments.

Review the rep's *prospecting plans* for the coming week – Reps will very often go into prospecting without a well thought out plan. If the rep plans to do in person cold calling find out where. Don't accept vague answers like a town. Ask for specifics like what street, what industrial park etc. If they have plans for telemarketing make sure they have a planned call list.

Find out if the rep needs help with anything – Before concluding the meeting the sales manager should ask the rep if there is anything else they need help with. It's pretty common for reps to want help but not ask for it. By asking the rep you can get them to share the needs and frustrations, allowing you to deal with them.

If you commit to doing these meetings every week you will quickly understand what is being done in the sales department and what needs to be done. You will have a clear understanding of the true strengths and weaknesses of each rep and you'll have a much better handle on what business will be coming in and be able to get the best resources in action for each deal. Chances are your sales department will never be the same again. If you have questions on this plan feel free to call or email. Good luck and good selling.

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About the Author, About the Company

Jim Kahrs is the Founder and President of Prosperity Plus Management Consulting, Inc., founded in 2001.

Prosperity Plus helps organizations build revenue and profitability while improving organization structure using the Hubbard® Management System. We provide consulting and training designed to improve everything from cash flow and profits to organization and personnel issues to sales and marketing communications. Our comprehensive approach to business consulting focuses on teaching management how to get a better handle on the business.

To learn more about our products and services, call 631-382-7762, or visit us online at www.prosperityplus.com

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