



Do You Know What Your Sales People Are Doing? Are They Doing What You Want?

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Dimensions of EXCELLENCE™ is based on the four dimensions of performance and organizational excellence. These are the foundation for our development programs oriented to achieving performance and organizational excellence in sales, marketing, and customer service.

These white papers provide concepts and ideas based on the application of these principles of these programs and our work with our clients. We welcome your comments and observations on these topics.

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As sales management professionals, sometimes, I think we take a little too much for granted. I'm amazed at how little we do really do in managing and developing our sales people, both those direct sales people and the indirect organizations. We tend to manage the numbers, but as many others have cited, that's kind of like driving by looking into your rear view mirror. We also tend to manage performance by impressions, instinct, "gut feel," opinions, or other means.

To be effective in managing performance, we must do it based on data and facts. We must be very clear on where we want to go (i.e. what the expected goals or targets are), and where we are. We must have a good understanding of the gap and what corrections are needed to close the gap.

There are many ways to look at performance management, in this white paper, I'd like to focus on three areas:

- **Activity management:** This focuses on what people are actually doing on a daily basis, and how those activities contribute to producing sales results.
- **Capability assessment:** This focuses on the capabilities of the people, their strengths, weaknesses, and potential.
- **Behavioral assessment:** Everyone is "wired" differently, people have certain behaviors they exhibit under various conditions. Increasingly, behavioral assessments are helpful in understanding what drives each individual.

Both are important in developing high performance sales professionals and organizations. These principles are important for sales managers, whether they are directly managing sales people or if they are managing the efforts of their channel partners.

Activity Management: Do your sales people have a plan and are they working it? That plan starts with goals they are to achieve. Usually, these may be expressed in terms of quotas, targets, or similar measurements. All sales professionals are familiar with these measurements. But more important, what are the activities required to achieve those goals or targets? Seemingly simple or trivial activities are key to building a disciplined approach to achieving goals: They can be things like:

- How many customer calls do they have to make each week?
- How many prospects does each professional need to qualify each week?
- How many orders to do they have to book a month?
- How many proposals to do they have to submit each month?
- Does each professional have enough activity at all levels of the funnel to assure that goals can be met (now and in the coming months)?

This isn't an exhaustive list, but they form the building blocks to making sure the activity levels are appropriate to achieving the goals. More advanced professionals also look at:

- What is the win rate? How can it be improved?
- What is the sales cycle time? How can it be shortened?
- What is the average transaction value? How can it be increased?
- Should the professional be disqualifying more opportunities, sooner?
- Are the resources of the company and its partners being used effectively?
- Is the professional calling on the right people, at the right time, addressing the right issues?

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- Is the sales person finding customers with real problems (pain) and is he presenting superior and differentiated solutions?

Again, these are a few indicators, there are many more.¹ Surprisingly, however, few sales managers have anything more than performance against the end goal as a measurement.

To drive sustained performance improvement, managers must put in place key activity measures that track leading indicators and the performance against those leading indicators. Managers must work with their people to assure they are meeting their activity goals. When they are not, the manager must determine what the problem is and with the sales professional develop a correction plan.

The important point, however, is that if the appropriate activity measures are not in place, it is impossible for both the sales professional and the manager to know if they are on target or will not meet their goals.

Capability assessment: Do your sales people have the capabilities and understanding to do what needs to be done to achieve the sales goals? There are many dimensions to their capabilities that are important. Some of these include:

- How well do they understand product, service and solution offerings of the company?
- How well do they understand the company (priorities, strategies, processes, practices, etc.)?
- How well do they understand the offerings and positioning of the competition?
- How well do they understand the customers' business, structure/organization, strategies, and challenges?
- How well do they understand the issues their customers' customers are facing?
- How well do they understand their customers' industries and competitors?
- How well do they understand and execute the company's selling processes?

Many others can be cited, but failure to meet activity goals could be the result of the sales person not having the capabilities to perform. Likewise, if the manager has knowledge of the strengths and weaknesses of their people, they can take early corrective action, to avoid missing activity goals. Usually, the capability deficiencies can be corrected with training and coaching activities.

Behavioral assessments: As I mentioned earlier, everyone is "wired" differently. Stated differently, each of us displays different behaviors. We tend to have natural behaviors—those that we exhibit under normal circumstances, adapted behaviors—those which we exhibit based on our ability to adapt to the situation, and stress behaviors—those that we exhibit in very difficult situations.

People tend to be very consistent in the way they act in the circumstances described above. Different jobs require different behavioral characteristics. Matching the person's behavioral characteristics to the desired behavioral characteristics for the job will help assure the individual will be successful.

How many times have you hired individuals that were fantastic in the interviews, only to find they failed to perform in the job? Behavioral assessments can help you avoid mis-hires like that. Behavioral assessments can also provide the manager the information needed coach sales people in how to be more effective, or potentially to identify that you may need to move a person into a different job.

There are many Behavioral Assessments available that can be easily and inexpensively used to understand how the people in your organization are "wired." We are finding this an increasingly effective tool to use in maximizing the performance of individuals and organizations.

¹ Many of our other white papers address specific aspects of each of these areas. Go to www.excellenc.com/articles.htm to access these, or email us at info@excellenc.com, or phone us at 949-706-1543.

Conclusion: Each of these assessments is important in maximizing the performance of individuals and organizations. These assessments can be used for direct sales organizations and with your channel partners. These assessments are critical in helping you lead your organization based on data and facts, not guesses or opinions.²

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² Partners In EXCELLENCE structures and administers a variety of assessments to provide the data you need to manage the performance of each individual and the organization. For more information, please contact us.