



**Sales Leadership
Best Practices Guide**

**Achieving & Maintaining
Continuous Profitable
Sales & Customer Growth
Performance**

By

David A. Kalstrom

877-337-2674

Outbound Excellence

February 21, 2010

The 2010 Best Practices Guide for Sales Leaders

“The 2010 Best Practices Guide for Sales Leaders” is a must-have tool for the truly competitive results-oriented sales leader. The modular, subject-centric design promotes flexibility for use of single modules for day-to-day sales leadership problem solving and short-term projects. In addition, multiple modules can be seamlessly leveraged as a cohesive platform for long-term strategic sales planning to map Key Sales Indicators (KSIs) and ensure the achievement of pre-defined outcomes and continuous sales growth.

Tools and Methodology for Achieving Continuous Sales Growth

If you're reading this, you're a sales leader looking for one thing: help to achieve and maintain continuous sales growth. This guide will provide you with the tools and methodology for achieving your sales growth goals.

Shift In Roles and Challenges of Sales Leaders

We have noticed a distinct "shift" in the roles and challenges of sales leaders this past year and as a result we have tailored this year's guide to meet the changing demands on today's sales leaders.

The distinct and dramatic shift we have seen is the transition of the role and requirements of today's sales leaders from a primary focus on developing "sales people" to a dual and equal focus on developing "sales processes."

Sales Leaders Innate Skills & Abilities to Develop “Sales People”

In the past great sales leaders have achieved and maintained a high degree of success because of their effectiveness in motivating and developing their “sales people”.

To most sales leaders this is a natural skill, it happens automatically, it's more of an "art" than a "science."

Combined with a strong economy, good customer demand, quality products and services and competitive pricing, sales leaders have experienced many years of success leveraging their knowledge, skills and abilities to teach and motivate “sales people” to achieve continuous, profitable sales growth performance.

Role of "Sales Processes" In Effective Sales Leadership

But over the past two years, the roles, responsibilities and challenges of Sales Leaders have changed significantly.

A depressed economy, reduced budgets and headcount, reduction in orders, increased buying cycles, limited access to decision makers and the increased use of technology to make buying decisions has completely changed the buying and selling processes of most successful companies.

Having a talented sales team, a great reputation, quality products and services and competitive pricing is no longer enough. You still need to get in front of the people who have the authority to make buying decisions about your products and services.

Using conventional sales techniques for reaching target decision makers is no longer effective. You know that. Cold calling down lists of sales leads trying to reach target decision makers to schedule appointments or to sell your products and services is no longer profitable.

You need to leverage newer and more effective "sales processes" such as reporting and tracking software, newsfeeds, social media and Web 2.0 business intelligence technology.

Aligning Buying and Selling Processes

For many sales organizations, their "sales processes" are misaligned with the buying processes of their prospects. Those companies that are identifying the changing buying processes of their target prospect companies and are re-aligning their sales processes, are taking market share away from their competitors.

Those companies that are resisting a change to their sales processes to align with the changing buying processes of their prospects are facing declining sales and market share and possible obsolescence.

More Effective Processes for Managing and Developing Accounts

Faced with declining sales opportunities, it is critical that sales leaders adopt new and more effective ways to prospect for new business.

It is equally important, and for many companies critically important, that more effective processes are put in place to ensure a maximum

probability that existing buying accounts are managed and developed more effectively.

The majority of the fastest growing and most profitable companies in America are growing by taking market share away from their competitors. They have also taken the time to put more effective processes in place to measure and monitor the buying patterns of their own existing customers to maintain their own market share.

They have implemented processes to measure and monitor the skills of their “sales people” in managing their existing buying accounts. They have processes in place to quickly audit the quality of data that is being captured and recorded on their installed base of customers to ensure the maximum probability they will retain and grow their installed base of accounts.

Tailored and Systematic “Development Processes”

Another pattern we have seen from the most profitable companies in this year’s Sales Leadership Survey is the increased focus on improving individual “development processes.”

There has been a dramatic improvement in the quality of reporting tools that are used to evaluate and develop the performance of “sales people.”

In previous years the primary focus of development plans has been to look at end results and then to establish action plans to increase end results. In most cases this was done with minimal analysis of the “means” or the details of the processes that caused poorer than expected results.

This year, we have seen a record number of “sales development processes” that measure the actionable steps that are being executed to achieve end results and then from this data create tailored action plans along with a systematic follow-up process.

Processes for Retaining and Growing Active Buying Accounts

We have seen a significant increase in “sales processes” that track the normal buying patterns of active buying accounts. Within days or weeks of a customer breaking their normal buying pattern it is automatically identified and reviewed with the assigned sales rep.

Processes for Improving Sales Forecasting

There has been a significant improvement in the methodology used to accurately forecast sales at the sales representative level. These are very simple but effective processes that can improve the average sales representative's ability to accurately forecast their sales within 3-5% of actual sales.

Processes for Account Management Audits

In no one area have we seen greater improvement and results than in the area of Account Management Audits and Development.

This has been a primary area of focus for our consulting business for the past 12 years as we have seen the immediate and significant results that can occur from implementing very quick and basic processes for monitoring and developing Account Management and Development performance.

The Value of Improving Existing Sales Processes

Our business is built on our ability to understand the value of sales processes and then to build and develop processes that lead to increased sales, profits and customer growth performance.

We passionately believe in the value any organization can achieve if they will put an equal focus on developing their sales processes as well as their sales people.

Achieving and Maintaining Continuous Profitable Sales Growth

Our 2010 "Sales Leadership – Best Practices Guide," is designed for Sales Leaders who believe in the power of leveraging improved sales processes to Achieve and Maintain Continuous Profitable Sales and Customer Growth performance.

Whether you are looking to better understand your sales processes, the methodologies used to improve sales processes, how these improvements lead to increased profitable sales growth performance, or if you're looking for proven, "turn- key" processes that you can drop right alongside your existing sales processes and achieve an immediate increase in sales growth performance, this year's 2010 Sales Leadership Guide will provide you with all the answers you need.

Hello, my name is David Kalstrom and I am the founder of Outbound Excellence.

I have more than 30 years of experience in B2B Sales.

My Direct Outbound Sales Experience includes:

- A 16 Year Career At Hewlett Packard
- V.P. Sales for 4 B2B Sales Organizations

My Sales Training and Development background includes the Design, Implementation and Support of

Sales Training and Development Programs for:

- Insight Enterprises' Call Center in Tempe, Arizona
- Insight's 1st International Call Center in Montreal, Canada
- Multiple Zones' Outbound Call Center in Renton, Washington
- Ryzex, Inc. Call Centers in the United States, Canada, the U.K. and France.

Additionally, Since Founding Outbound Excellence, I Have:

- Analyzed The Outbound Sales Systems, Strategies and Structures Of More Than 50 B2B Sales Organizations in 5 Different Countries
- Designed, Implemented and Supported over 350 Profitable Sales Growth Processes - Establishing Outbound Excellence As Having one of The Highest "Process Based" Profitable Sales and Customer Growth Competencies In The World.

**Outbound Excellence Provides Sales Leaders
with Sales Growth Tools and Coaching
Services That Allow Them to Maximize Sales,
Profits and Customer Growth Performance.**

**David Kalstrom
Outbound Excellence
877-337-2674**

Table of Contents

Phase I

Preparing To Improve

Profitable Sales Growth Performance

I. Introduction

II. Strategy + Culture + Leadership

III. Profitable Sales Growth Simplified

Phase II

What Is Sales Process Improvement?

IV. What is a Sales Process?

V. Example of Sales Processes

VI. Importance of Sales Processes

VII. Associated Sales Processes

VIII. Who Owns Sales Processes

IX. What Is Sales Process Improvement

X. What's Wrong With A Problem Solving Approach?

XI. Identifying & Resolving Root Causes Of Sales Problems

XII. Factors Affecting Sales Processes

XIII. Who Owns Sales Process Improvement

XIV. How Does Sales Process Improvement Benefit The Organization

XV. How Does A Organization Get Started On Sales Process Improvement

Phase III

How Does A Profitable Sales Growth Process Improvement System Work?

Step 1: Conduct Sales System Analysis

Step 2: Select Sales Processes To Improve

Step 3: Select Sequence In Which Sales Processes Will be Improved

Step 4: Establish The Sales Process - Improvement Objective

Step 5: Organize The "Right" Team

Step 6: Flow Chart The Current Sales Process

Step 7: Improve The Sales Process

Step 8: Flow Chart The Improved Sales Process

Step 9: Develop A Data Collection Plan

Step 10: Implement The Data Collection Plan

Step 11: Determine If The Sales Process Is Stable?

Step 12: Determine If The Sales Process Is Capable?

Step 13: Identify Root Causes For Lack Of Capability

Step 14: Plan To Implement The Improved Sales Process

Step 15: Modify The Data Collection Plan, If Necessary

Step 16: Test The Change & Collect Data

Step 17: Is The Modified Sales Process Stable?

Step 18: Does The Improved Sales Process Meet Its Objective

Step 19: Standardize The Improved Sales Process

Step 20: Reduce The Frequency Of Data Collection

Phase IV

Pre-Designed, Tested & Proven **Profitable Sales Growth Processes**

The previous sections of this year's guide were developed for those Sales Leaders looking for a better understanding of the tools and methodologies that would allow them to improve their existing sales processes in a manner that would result in their sales organization achieving and maintaining increased levels of continuous profitable sales and customer growth performance.

The following section is for sales leaders that are looking for proven, "turn-key" sales processes that are pre-designed, pre-developed and pre-tested and have already proven their ability to increase sales growth performance.

These are "plug-n-play" processes that drop right alongside existing sales processes and provide an immediate increase in sales, profits and / or customer growth performance. These are a compilation of proven best practices from more than 12 years of sales leadership coaching.

Step #1 - Job Description

- ❖ Fallacy vs Reality
- ❖ Outbound B2B Telephone Sales Rep.
- ❖ Outbound Sales Manager
- ❖ Director of Outbound Sales
- ❖ Vice President of Outbound Sales
- ❖ Channel Manager
- ❖ Sales Recruiter
- ❖ Sales Leads Coordinator

Step #2 - Compensation & Incentive

- ❖ Understanding Gross Margin
- ❖ 12% Commission Margin Dollar vs Draw
- ❖ Progressive Gross Margin w/ Bonus
- ❖ Mentor - Mentee / Hunter - Gatherer Plan
- ❖ New Hire Base + KSI Bonus

Step #3 - Recruiting

- ❖ **Top Recruiting Sources**
- ❖ **Recruiting Performance Report**
- ❖ **Telephone Screen - Pre-Qualifier**
- ❖ **Summary Of Phone Interview**
- ❖ **Ideal Sales Candidate Profile Analysis**
- ❖ **New Sales Reps Budget vs Actual**
- ❖ **New Hire Performance Recruiting Bonus**

Step #4 - Hiring / Sales Force Sizing

- ❖ **Calculating The Cost Of Bad Hires**
- ❖ **Recruiting and Hiring Benefits**
- ❖ **Behavioral Interviewing Questions**
- ❖ **Pre-Evaluating Sales People Before Hiring**
- ❖ **Prospecting Exercise Instructions**
- ❖ **Business Plan Exercise**
- ❖ **Quick Quota Calculator**
- ❖ **Offer Letter Account Manager**
- ❖ **IT Set-Up Form New Hires**
- ❖ **Final Notes On Developing A Strategy**

Step #5 - Sales Training & Development

- ❖ **Sales Training & Development Schedule**
- ❖ **Sales Training Classroom Rules**
- ❖ **Progress Monitoring Testing Modules**
- ❖ **Product Knowledge Analysis**
- ❖ **Professional Development Analysis**
- ❖ **Company Knowledge Analysis**
- ❖ **Industry Knowledge Analysis**
- ❖ **Key Sales Initiatives**
- ❖ **Adherence To Sales System**
- ❖ **Strategic vs Tactical Selling**
- ❖ **New Hire Prospecting Strategy**
- ❖ **Sales Call Roadmap Tactical**
- ❖ **Prospecting Profiler and Qualifier**
- ❖ **Account Profile Map**
- ❖ **Responding To Common Objections**
- ❖ **Concede And Then Proceed**
- ❖ **Feature Advantage Results**
- ❖ **Product Sales Value Matrix**
- ❖ **Top Products Sold**
- ❖ **Top Products Comparison Matrix**
- ❖ **Sales Promotion Map**
- ❖ **Standardized Closing Statements**
- ❖ **ROI Calculator**
- ❖ **Feedback Survey**
- ❖ **On Going Development Plan**

Step #6 - Sales Leads / Account Assignment

- ❖ **Lead Team Responsibilities**
- ❖ **Policies and Procedures**
- ❖ **Top Customers By Margin**
- ❖ **Top Customer Markets Analysis**
- ❖ **Target Industry Market Analysis**
- ❖ **Target Market Penetration Analysis**
- ❖ **Target Market Strategy**
- ❖ **Key Lead Sources**
- ❖ **Territory Assignments**
- ❖ **Account Allocation Policy**
- ❖ **Lead Source Tracking Report**
- ❖ **Lead Request Tracking Report**
- ❖ **Lead Distribution Report**
- ❖ **Quarterly Performance Report**
- ❖ **Lead Requests vs Sales Performance**

Step #7 - Performance Goals

- ❖ **Daily Call Tracker**
- ❖ **Daily Goals Planner**
- ❖ **Critical Success Factors**
- ❖ **Achieving High Performance Goals**
- ❖ **Sales Forecast Update Individual**
- ❖ **Sales Forecast Update Team**
- ❖ **Sales Forecasting By Account**
- ❖ **Sales Forecasting Yr 1**
- ❖ **Calculating Sales Quotas**
- ❖ **Annual Sales Quota Matrix**
- ❖ **Sales Quotes Status Report**
- ❖ **Call Coaching Schedule**
- ❖ **Account Benchmarks by AM**
- ❖ **Customer Dials Self Audit Report**
- ❖ **Historical Tracking Call Performance vs Goals**
- ❖ **Sales Management Initiatives**

Step #8 - Selling Skills

- ❖ **3 Keys To Achieving Profitable Sales and Customer Growth**
- ❖ **10 Tips for Maximizing Call Coaching Performance**
- ❖ **Achieving Peak Performance Getting Into The Flow**
- ❖ **Call Coach Form**
- ❖ **Call Coacher + Pre-Call Planner**
- ❖ **Call Coaching Form**
- ❖ **Call Coaching Tips**
- ❖ **Large Account Selling Strategy**
- ❖ **Large Opportunity Planner Tracker**

- ❖ Strategic Accounts Profile Matrix
- ❖ Understanding Customer Needs
- ❖ Value Matrix Good Better Best
- ❖ Value Matrix Products
- ❖ Value Matrix Services

Step #9a - Account Management

Account Audit Report New Hire
Account Audit Matrix
Account Research
Acquisition Retention Analysis
Active Buying Accts Sales By Month
Analysis of New Service Customers
Change In Customer Buying Patterns
Company Performance Report
Cross Ref Intl Loc Key Accts
Customer Satisfaction Action Plan
Detailed Account Potential Analysis
Last Activity Report
Lost Customer Inquiry Letter
Net Loss Gain In Customers Analysis
New Customer Report
Reasons For Lost Accounts
Top 50 Customer Tracking Report
Top Customer Overdue Buyers Report

Step #9b - Account Development

- ❖ Active and New To File Customers Analysis
- ❖ Appreciation Gift Tracker
- ❖ Back Order Report
- ❖ Best Selling SKUs vs Total SKUs
- ❖ Calculating Customer Value
- ❖ Customer Acquisition Retention Performance Report
- ❖ Customer Appreciation Gifts Policy
- ❖ Customer Development by AM
- ❖ Customer Gift Selection
- ❖ Growth Initiatives Tracker
- ❖ Historical Average Sales Per Customer
- ❖ Historical Re-buy Rate
- ❖ Large Opportunity Qualification Tracking Form
- ❖ Multi-Buyer Trends Historical
- ❖ Multi-Buyer Trends Monthly
- ❖ New Customer Report
- ❖ Sales By Loc & Mfg
- ❖ Sales By Rev Segment
- ❖ SKUs to Eliminate
- ❖ Thank You Letter Top Customer
- ❖ Top Selling Products Qtr Trends
- ❖ Volume Pricing Schedule CD Media Sleeves

- ❖ **Volume Pricing Schedule CD Media**
- ❖ **Volume Purchasing Agreement**
- ❖ **VPA Policies and Procedures**
- ❖ **VPA Request Form**

Step #10 - Performance Monitoring

- ❖ **Subjective New Hire Review**
- ❖ **AM MTD & YTD Invoiced Sales**
- ❖ **Annual Sales Growth Per Sales Representative**
- ❖ **Daily Performance Report**
- ❖ **Monthly & YTD Sales KSI vs Goal**
- ❖ **MTD Company Performance**
- ❖ **MTD YTD Invoiced Sales by AM**
- ❖ **New Hire Audit 1 of 3**
- ❖ **New Hire Audit 2 of 3**
- ❖ **New Hire Audit 3 of 3**
- ❖ **Sales Quote Tracker**
- ❖ **Vacation and Sick Day Tracker**

Step #11 - Performance Development

3 Step Process
Action Planner
Assigned Accounts Audit & Action Plan
Individual Development Status Report
Individual Initiatives Tracking Report
PIP Written Warning
Quad Coaching Matrix
Results Improvement Strategy

Step #12a - Employee Termination

Exit Interview Questionnaire
Exit Interview
Reasons For Termination
Separation Checklist
Severance Letter

Step #12b - Account Transition

Qualification Matrix
Transitioned Account Analysis

**If you are interested in a free 30 minute consultation to determine how proven, turn-key, sales growth processes can increase your sales performance, give me a call at 877-337-2674 – David Kalstrom
– President, Outbound Excellence – www.outboundexcellence.com.**

How Profitable Sales Growth Is Achieved

Establish Your “Standard For Excellence”

There are many definitions for Strategy, Culture & Leadership, and the exact definition selected is not near as important as selecting definitions that you are willing to accept as the standard benchmark for your sales organization and the one to which all future changes will be measured against.

Defining: Strategy + Culture + Leadership

The definitions we have selected as benchmarks within our own organization are:

Strategy - Defined

"Achievement Of Profitable Sales Growth Requires The Continuous Improvement Of Each Person, Process And Productivity Measurement Within An Organization To Ensure It Is Performing At Optimum Efficiency And Effectiveness, Resulting In The Potential To Provide Increasing Value To The Customer, Profit To The Company, And Financial Incentives To The Employee."

Strategy only ensures the "Potential" for Achieving Excellence because the ultimate level of Achievement of the organization will also be influenced by the value of the Culture and Leadership Variables within the organization.

In short, in order for any organization to Achieve and maintain – Continuous Profitable Sales & Customer Growth Performance – the organization must be “Engineered For Excellence.”

Is The Organization – “Engineered For Excellence?”

More times than not, an in depth analysis of an Outbound Sales Organization’s – Sales Growth Strategy results in the findings that the current strategy is simply not capable of Achieving the level of Profitable Sales Growth performance that it is capable of achieving.

But regardless of the quality and potential for achieving excellence of a Sales Organization’s strategy, it will not achieve and maintain profitable sales growth unless the people that execute the strategy support it, and passionately work toward continually improving it.

Culture – Defined

One of the most effective definitions we have ever found for improving the quality and effectiveness of an organization’s culture comes from Rensis Likert:

An “organization must be such as to ensure a maximum probability that in all interactions and all relationships within the organization each member will in the light of his background, values and expectations, view the experience as supportive and one which builds and maintains his sense of personal worth and importance.”

We are often amazed by the number of people within an organization that are not willing to devote their time, effort and support to improving their sales strategy.

Does The Organization Have A “Passion For Excellence?”

In general, people resist change. They like to get in and stay in a scheduled routine, a comfort zone. And once enough people get too comfortable in their comfort zone, they can create a significant obstacle to achieving and maintaining Profitable Sales Growth Performance.

But that’s what makes Culture so important. Just as complacency can prevent profitable sales growth, developing a “Passion For Excellence” can be a catalyst for Producing and Maintaining Improved Sales, Profit and Customer Growth Performance.

This brings us to the third and final component of the Profitable Sales Growth Model Leadership.

Leadership - Defined

Of course leadership by its nature is designed and responsible to make sure that the organization’s strategy and culture are developed in a manner that results in the organization Achieving & Maintaining – Profitable Sales & Customer Growth Performance.

We define Leadership as it relates to Profitable Sales Growth of the Outbound Sales Organization as follows:

“Leadership is demonstrating the Knowledge, Ability & Willingness to Teach & Motivate people to Learn and Adapt to new and More Effective Sales Processes, Resulting in Continuous, Profitable Sales & Customer Growth Performance.”

In short, Profitable Sales Growth requires that the Leadership within the organization establish by example, a “Relentless Pursuit of Excellence.”

Profitable Sales Growth - Simplified

- 1) Improve Your Sales People**
- 2) Improve Your Sales Processes**
- 3) You’ll Improve Your Profitable Sales Growth Performance**

Once your organization has agreed on how Strategy, Culture & Leadership will be defined, the next step is to obtain accurate benchmarks for the current level of performance of each of these variables.

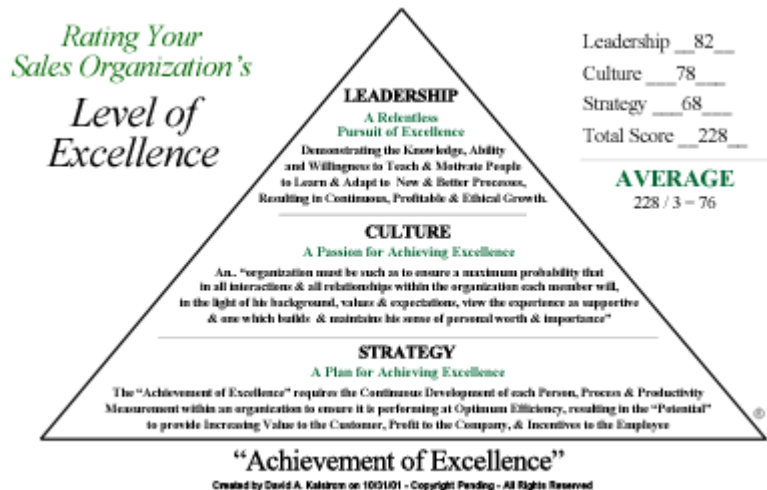
Benchmarking - “Potential for Sales Growth”

We have been measuring and analyzing the Strategy, Culture & Leadership elements of companies for twelve years.

By monitoring both the scoring of different outbound sales organizations using different variations of proven testing modules, as well as having the ability to benchmark the performance of various sales organizations, we have developed our own system that has proven effective in accurately measuring and

benchmarking the effectiveness of an organization's strategy, culture and leadership.

Benchmarking - "Potential for Sales Growth"



Reinforcing The Foundation For Profitable Sales Growth

For organization's that score below an 80% rating using our Profitable Sales Growth – Triangle Analysis, we would first develop a strategy for improving the rating to over 80% before beginning work on improving the individual Sales Processes and work flow patterns that comprise the organization's sales growth strategy.

We can provide your organization with the tools necessary to evaluate your sales organization's ability to Achieve & Maintain Profitable Sales & Customer Growth Performance or we can conduct the analysis for you.

Improving Profitable Sales Growth Performance

Once an organization has established its ability to achieve and maintain profitable sales growth performance, the next phase of

the Profitable sales growth Model is to begin the actual improvement of the organization's sales processes.

But before we begin discussing the actual improvement process, we'll take just a moment to list the most common questions that arise during the presentation of the next phase of our profitable sales growth System along with the answers to each question.

What is a Sales Process?

A Sales Process is simply a series of steps and decisions involved in the way work is accomplished within a sales organization.

Everything that happens within an Outbound B2B Telephone Sales Organization involves processes and the sequential steps in which each sales process is executed.

Example Of Sales Processes

Developing A Job Description	Creating A Sales Compensation Plan	Recruiting New Sales People	Providing Sales Training To New Hires
Conducting Daily Call Blitz Sessions	Determining Sales Quotas & Sales Forecasts	Obtaining & Distributing Sales Leads	Conducting Pre-Call Research + Pre-Call Planning
Making An Introduction Sales Call	Ordering Desks & Supplies for New Hires	Matching Offerings To Customer Needs	Generating Sales Quotes & Processing Sales Orders
Effectively Managing Buying Accounts	Monitoring Sales Performance	Transitioning Accounts After Terminations	Improving Profitable Sales Growth Performance

... and the list of Sales Processes goes on.

Importance Of Sales Processes

As you can see, the Level of Importance of Sales Processes Varies.

Significant Sales Processes

- Some processes, such as **Hiring The Right Sales People / Not Making A Hiring Mistake, Providing New Hires with the Proper Sales Training, and Providing Sales People with Effective Sales Leads** are very important.

When developing a **Profitable Sales Growth Strategy** for an **Outbound B2B Telephone Sales Organization**, each process within each component of the following **Sales Growth Strategy** is deemed “**Significant**” in terms of the organization’s ability to maximize the **Sales, Profits and Customer growth** achieved by the **Sales Organization**.



Created by David A. Kalstrom on 10/31/01 - Copyright Pending - All Rights Reserved

If such processes perform poorly—if they are not doing what they were designed to do—the sales organization will not be able to **Achieve & Maintain the level of Continuous Profitable Sales Growth Performance** it is capable of achieving.

Less Significant - Sales Processes

Less significant processes involved in the efficient and effective running of the day to operations of an **Outbound Sales**

Organization include – ordering office supplies, tracking attendance and vacation requests, providing access to system files and folders- are less significant in terms of the Sales Organization’s mission and objectives.

But, while they are less important to the day to day operation of the sales organization, such routine processes are still vital to the smooth running of the Sales Office.

Simple Sales Processes

Besides differing in importance, Sales Processes can be either be Simple or Complex. Some Sales Processes may be comparatively simple.

Placing a newspaper ad for new hires, for example, may be a relatively simple task involving only a few people and straightforward procedures.

Complex Sales Processes

On the other hand, some sales processes, such as conducting an Annual Performance Review, and Developing & Executing Individual Performance Improvement Plans, are very complex.

Many people from different departments are usually involved and numerous process steps and contributing processes are required.

What Are Associated Sales Processes?

Associated Sales Processes are those processes that are executed in part by members outside the sales organization (e.g. members

of sales support functions / departments). These are better known as interdepartmental processes.

They involve the execution of steps of processes with the 12 Components of the Outbound Sales Growth Strategy, but are executed in part by members from different departments.

Who Owns Sales Processes?

Everyone within a company plays some form of a role in the effective execution of one or more processes within the sales organization.

Groups of individuals usually share in—and "own"—the activities which make up a Sales Process. The one individual who is ultimately responsible and accountable for the proper working of the process is known as the "Sales Process Owner." The Sales Process Owner is the manager or leader who has control over the entire Sales Process from beginning to end.

What is Sales Process Improvement?

"Sales Process Improvement" means making the steps people take in executing a sales process, as well as the sequence in which the steps of a sales process are executed, more effective.

Often, the only time a sales process is diagrammed, analyzed and improved is when a crisis occurs and changes need to be made to fight the crisis fire.

You'll Find Whatever You're Looking For

What Sales Process Improvement means to companies that have achieved significant breakthroughs in improving the Profitable Sales Growth Performance of their Sales Organizations is setting aside the customary practice of blaming people for problems or failures.

It is a way of looking at how we can do our work better.

What's Wrong With A Problem Solving Approach

When we take a problem-solving approach or simply try to fix what's broken, we may never discover or understand the root cause of the difficulty.

Therefore, organizations often spend valuable time "Patching Up Processes" to "Solve A Problem," just to learn sometime later that their efforts to "fix" things actually created or increased problems in other areas of the Sales Organization and as for the Sales Organization as a whole, actually made things worse.

Identifying & Resolving Root Causes

However, when we engage in true sales process improvement, we seek to learn what *causes* things to happen in a sales process and to use this knowledge to reduce variation, remove activities that contribute no value to the results produced, and improve internal and or external customer satisfaction.

Factors Affecting Sales Processes

In order to Identify and resolve the root causes of Sales Growth problems, all of the factors affecting the process must be known:

- + Materials Used In The Process**
- + People Involved In Executing The Steps Of The Processes**
- + Methods Used To Transform The Processes Into Results**

Who Owns Sales Process Improvement

A Sales Process Owner may choose to be a team leader and participate directly in the actions of a sales process improvement team. Or, the sales process owner may decide to delegate the team leadership role to another person who is knowledgeable about the process. Whatever the case, it is very important for the process owner to stay informed about the team's actions and decisions affecting the process.

How Does Process Improvement Benefit The Organization?

A standardized sales process improvement methodology allows us to take a close look at how work is being performed throughout our Sales Organization.

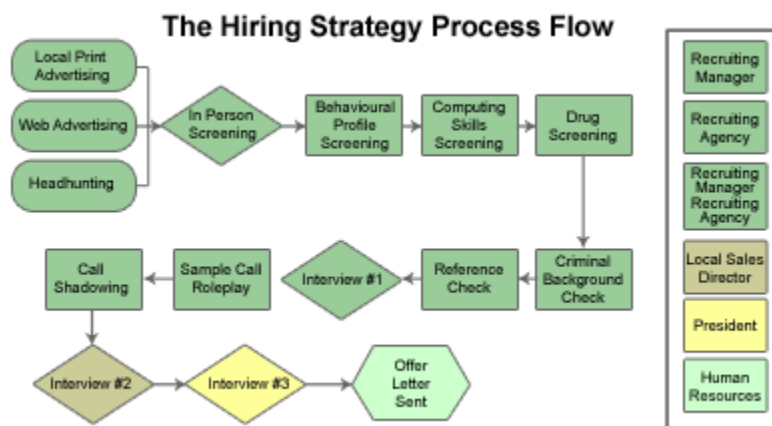
When all people involved in executing the steps of a Sales Process come together, to work on a process improvement project, they are usually seeing a complete picture of the entire process for the first time.

A Picture Tells A Thousand Words

So for the first time, each person involved with the execution of a large sales process can see exactly how their individual

contributions to a sales process contributes to the quality and effectiveness of the product or service the process was designed to produce (e.g. quality of new hires, new hire ramp up time to profitability, account turnover, etc.)

The result of simply providing a complete and accurate image of a process to the entire group of people involved with the execution of that process allows for the collective focus on eliminating waste—of money, people, materials, time, and opportunities.



Anytime a proven scientific methodology for improving sales processes is effectively executed with the complete team of employees that execute the steps within a process, the outcome is that jobs can be done cheaper, quicker, easier, and—most importantly— while Improving – Profitable Sales Growth Performance.

Teamwork Teamwork Teamwork!

A teamwork approach is intrinsic to life in any Successful Outbound B2B Telephone Sales Organization.

Integrating sales process analysis and improvement tools and methods into an Outbound Sales Organization reinforces teamwork. And teamwork plays a vital role in achievement.

Using team members' collective knowledge, experiences, and efforts is a powerful approach to improving the profitability that improving sales processes provides.

Through teamwork, the whole becomes much greater than the sum of its parts.

How Does An Organization Get Started On Sales Process Improvement?

An essential first step in getting started on Sales Process Improvement is for the senior leader of the organization to make it a Strategic Initiative and to effectively communicate the importance of Sales Process Improvement to the entire organization.

The importance of sales process improvement must be communicated from the top. Leaders need to foster an organizational environment in which a Sales Process Improvement mentality can thrive and people are using quality-improvement tools and techniques on a regular basis.

Sales Process Improvement – Training

For the organization to reach this state, leaders must ensure that everyone receives the training that will enable them to carry out their process improvement efforts effectively.

Outbound Excellence provides Sales Process Improvement training and learning experiences for business and sales leaders and quality managers who can then train teams on a just-in-time basis.

A New Mindset - Problem Preventing vs Problem Fighting

Instilling a process improvement mentality in an organization can be difficult because it requires some different ways of thinking than we are accustomed to in most companies today.

Sales process improvement requires everyone to become a "Problem Preventer," rather than a "Problem Fighter."

The focus is on improving Sales Processes over the long term, not just patching up procedures and work routines as problems occur.

To get started on Sales Process Improvement, leaders who have been fighting problems need to set aside their battle armor and start thinking in these terms:

- + What Sales Process should we select for improvement?**
- + What resources are required to improve the Sales Process?**
- + Who are the right people to improve the Sales Process?**
- + What's the best way to learn about the Sales Process?**
- + How do we go about improving the Sales Process?**
- + How can we institutionalize the improved Sales Process?**

Outbound Excellence's

Step-By-Step Guide

For

Achieving & Maintaining

Continuous Profitable

Sales & Customer Growth

Performance

Phase #3

20 Steps To Achieving & Maintaining Continuous Profitable Sales & Customer Growth

Step 1: Conduct "Outbound Excellence" Sales System Analysis

Step 2: Select Sales Processes To Improve

Step 3: Select Sequence In Which Sales Processes Will be Improved

Step 4: Establish The Sales Process - Improvement Objective

Step 5: Organize The "Right" Team

Step 6: Flow Chart The Current Sales Process

Step 7: Improve The Sales Process

Step 8: Flow Chart The Improved Sales Process

Step 9: Develop A Data Collection Plan

Step 10: Implement The Data Collection Plan

Step 11: Determine If The Sales Process Is Stable?

Step 12: Determine If The Sales Process Is Capable?

Step 13: Identify Root Causes For Lack Of Capability

Step 14: Plan To Implement The Improved Sales Process

Step 15: Modify The Data Collection Plan, If Necessary

Step 16: Test The Change & Collect Data

Step 17: Is The Modified Sales Process Stable?

Step 18: Does The Improved Sales Process Meet Its Objective

Step 19: Standardize The Improved Sales Process

Step 20: Reduce The Frequency Of Data Collection

Step 1: Conduct “Outbound Excellence” Sales Strategy Analysis

The 1st Step in Improving the Profitable Sales & Customer Growth Performance of a B2B Sales Organization is to conduct a thorough Analysis of the organization’s Sales Growth Strategy.

A B2B Sales Strategy consists of the following 12 Core Components:



Each of the 12 Components are comprised of groups of inter-related identifiable sales processes executed in sequential steps or work flow patterns.

Since all Sales Process within a Sales Growth Strategy can be Identified, they can also be Analyzed, Measured, Monitored and Improved.

Since each sales process within each component of a sales growth strategy can be improved, the overall performance of the sales growth strategy as well as the Performance of the Sales Organization it was designed to govern can be improved as well.

A great benefit of using a “Defined System” to improve Sales Processes is that improvements can be made indefinitely, starting with larger increments of improvement and gradually improving in smaller and smaller increments.

Performance Benchmark Options

The analysis of the Outbound Sales Strategy can be conducted in-house based on the Actual Performance of each component against its Pre-Established Performance Goal, or we can analyze your Strategy for you using either our Patented Sales Strategy Analyzer or using Industry Standard Benchmarks.

Step 2: Select The Sales Processes To Improve



Created by David A. Kalstrom on 10/31/01 - Copyright Pending - All Rights Reserved

Our Outbound Excellence – Sales Strategy Analyzer – provides:

1. An Accurate Performance Rating For Each Of The 12 Individual Components Of Your Outbound B2B Telephone Sales Strategy
2. A Performance Rating For Your Overall Sales Strategy
3. The Maximum Performance Rating Achievable
4. The Potential For Improved Profitable Sales & Customer Growth Performance By Improving Your Current Sales Strategy

Step 3: Select Sequence For Improving Sale Processes

Every component of an effective B2B Sales Growth Strategy is tightly woven together, each component relying on the effectiveness of the other, with the overall Productivity, Performance & Profitability of the B2B Sales Organization limited to the least effective component of the sales strategy.

Systematically Improving The Effectiveness Of Each Component

So with a baseline value established for each component of your - Sales Growth Strategy – you can improve the effectiveness of your Sales Strategy, as well as the Profitable Sales Growth Performance of the Sales Organization it was designed to govern, by systematically improving the effectiveness of each component, beginning with the weakest component and systematically working toward the strongest component.



Step 4: Establish The Process Improvement Objective

Once a Sales Process is selected, the team needs to establish a well-defined **Sales Process Improvement Objective**. The definition of the objective should answer this question:

What Improvement Do We Want To Accomplish By Using A Sales Process Improvement Methodology?

The team can use interviews or written surveys to identify target values to use as goals for improving the product or service produced by the Sales Process.

If performance monitoring tools are not already in place to monitor and measure the performance of each process, a **Data Collection Plan** will be developed in Step #9 and **Baseline Data** will be collected to establish accurate benchmarks against which all future changes to existing sales processes will be measured to ensure **Improved Sales Performance** is being **Achieved and Maintained**.

Begin By Identifying Symptoms Of Sales Process Failure

Identifying a problem associated with the Sales Process helps define the **Sales Process Improvement Objective**. The people working in the Sales Process can identify activities that take too long, involve **too many man-hours**, include **redundant or unnecessary steps**, or are subject to **frequent breakdowns** or other **delays**.

This is not just a **Problem-Solving Exercise**; this is Sales Process Improvement Exercise.

Isolate The Process Deficiencies From The Symptoms

Problems are symptoms of **Sales Process Failure**, and it is the deficiencies in the Sales process that must be identified and corrected.

For a **Sales Process Improvement Effort** to be successful, the team must start with a clear definition of what the problem is and what is expected from the Sales process improvement.

Stay Within The Boundaries

It is crucial to make sure that the steps involved in meeting the process improvement objective are located inside the boundaries.

Examples:

- ❖ If the **quality of the way new sales candidates** are recruited and hired is described simply as "**unsatisfactory**," few people will know how to state the Sales process improvement objective.
- ❖ But, if the nature of the problem is clearly stated as "50 percent of our New Sales Hires do not meet the minimum requirements listed on our Recruiting / Hiring Performance Tracking Report.
- ❖ The objective can be stated this way: "**At Least 95 Percent Of Our New Sales Hires Will Meet The Minimum Requirements Listed On Our Recruiting / Hiring Performance Tracking Report.**"

Hiring Objective Examples:

- 1) Increase Performance Rating of Hiring Strategy from 5.75 to 7.25**
- 2) Improve the Average Sales Aptitude Score of all New Hires by 35%**
- 3) Improve Net New Hire Growth by 20%**

Timeframe: 120 Days

Establishing The Sales Process Improvement Objective

A team formulating a Sales process improvement objective may find it helpful to proceed in this way:

- 1. Write A Description Of The Sales Process, Starting, "The Sales Process By Which We..."**
- 2. Specify The Objective Of The Sales Process Improvement Effort.**
- 3. Operationally Define The Sales Process Improvement Objective In Writing.**
- 4. Use Numerical Specification Limits For Sales Process Improvement Objectives Whenever Possible.**
- 5. Decide How Much Time The Team Will Devote To Sales Process Improvement. Sometimes, Improving A Sales Process Is Important Enough To Require A Full-Time Effort By Team Members For A Short Period. At Other Times, The Improvement Effort Is Best Conducted At Intervals In One- Or Two-Hour Segments.**

A Pareto Analysis can help the team identify one or more factors or problems which occur frequently and can be investigated by the team. This analysis would be based on some preliminary data collected by the team.

Step 5: Organize The "Right" Team

Sales Process Improvement - Team Members - are selected by the team leader or the individual who formed the team. Based on the Sales Process being improved, they may come from different departments, divisions, work centers, or offices.

The **Key Factor** is that the people selected for the team should be closely involved in the Sales Process that is being improved. Being a team member has certain obligations.

Sales Process Improvement - Team Member Responsibilities

Members are responsible for carrying out all team-related work assignments, such as:

- ✚ Data Collection**
- ✚ Data Analysis**
- ✚ Presentation Development**
- ✚ Sharing Knowledge**
- ✚ Participation In Discussions & Decisions**

Opportunity To Identify Future Leaders

Ideally, when actual Sales process workers are on a team, they approach these responsibilities as an opportunity to improve the way their jobs are done, rather than as extra work.

Organizing A Team To Improve A Sales Process Involves

- 1) **Selecting The "Right" People To Serve On The Team**
- 2) **Identifying The Resources, Requirements & Levels of Authority For The Improvement Effort:**
 - a. People
 - b. Time
 - c. Money
 - d. Materials
 - e. Setting Reporting Requirements
 - f. Determining The Team's Level Of Authority
- 3) **The Sales Process Boundaries Have To Be Determined.**
 - a. These are the Starting And Stopping Points of the Sales Process that provide a framework within which the team will conduct its Sales Process Improvement Efforts
 - b. It is crucial to make sure that the Steps Involved in meeting the Sales Process Improvement Objective are Located Inside The Boundaries.
 - c. A Pareto Analysis can help the team Identify one or more factors or Problems Which Occur Frequently and can be investigated by the team. This analysis would be based on some preliminary data collected by the team.

These elements may be formalized in a written Team Charter Worksheet.

Creating A Sales Process Improvement - Charter

- ✚ A Sales Process Improvement Charter is a document that:
 - Describes the Boundaries, Expected Results, and Resources to be used by a Sales Process Improvement Team
 - Is Usually Provided by the individual who formed the team or the Sales Process Owner
 - Is Always Required for a team working on a Sales Process that Crosses Departmental Lines
 - May Not Be Necessary for a team that is improving a Sales process found Solely Within A Single Work Center

✚ A Sales Process Improvement Charter Should Identify:

- ✚ Sales Process To Be Improved
- ✚ Time Constraints, If Applicable
- ✚ Sales Process Improvement Objective
- ✚ Team's Decision-Making Authority
- ✚ Team Leader Assigned
- ✚ Resources To Be Provided
- ✚ Team Members Assigned
- ✚ Reporting Requirements

Other information pertinent to the improvement effort may also be included, such as the names of the Sales Process Owner and quality advisor, recommended frequency of meetings, or any other elements deemed necessary by those chartering the team.

SALES PROCESS IMPROVEMENT

CHARTER WORKSHEET

PROCESS:

PROCESS OWNER:

PROCESS IMPROVEMENT OBJECTIVE :

Team Leader:

Facilitator / Quality Advisor:

Team Member	Ext.	Employee #	Dept. Manager	Dept. Code	Ext.

DATE BEGIN:

DATE END:

MEETING FREQUENCY:

DECISION-MAKING AUTHORITY:

RESOURCES AVAILABLE:

REPORTING REQUIREMENTS:

OTHER INFORMATION:

CHARTERED BY :

DATE:

Establishing Team - Ground Rules

No Sales Process Improvement Team should begin Sales Process Improvement Work without developing a **Clear-Cut Set Of Ground Rules For The Operation Of The Team.**

1) Attendance: Expectation of regular attendance at meetings, acceptable reasons for missing meetings, whether to allow alternates to attend when members must be absent, number of members required to conduct business.

2) Promptness: Starting and ending time for meetings.

3) Preparation: Expectation that team members will complete assignments in advance and come prepared for each meeting.

4) Participation: Active listening, suspending personal beliefs, and free communication by all members.

5) Courtesy: One person talks at a time; no interruptions or side conversations; no personal attacks; all members treated as partners, not adversaries.

6) Assignments: Methods for making and tracking assignments and selecting the recorder.

7) Decisions: Decision-making procedures—consensus or open or closed majority vote.

8) Focus: Things to do to stay focused on the future, not rooted in the past.

Sales Process Improvement - Team Meeting Record

The Sales Process Improvement Team Meeting Record helps teams follow the guidelines for conducting effective meetings:

- A) Follow the meeting ground rules.
- B) Use an agenda. (See the agenda example.)
- C) List the items to be discussed in as much detail as needed
- D) State time available for each item.
- E) Name who is responsible for each item.
- F) Publish the agenda in advance.

Training for the Team

At this juncture, team members need to receive some training that will help them reach their Sales Process Improvement Objective.

The Team Leader should provide training on how to operate effectively as a team as well as just-in-time training in the use of statistical tools.

Step 6: Flow Chart The Current Sales Process

Define the current process using an “Original State” flow chart. This tool is used to generate a step-by-step map of the activities, actions, and decisions which occur between the starting and stopping points of the sales process.

Before a team can improve a sales process, each of the members must understand how it works. The most useful tool for studying a sales process is a flow chart.

Observing Sales Process – Work Flow

To develop an **accurate flow chart**, the team assigns one or more members **to observe the entire flow of work** from the starting point to the ending point of the Sales process.

It may be necessary for the observers to **follow the flow of activity** through the Sales Process **several times** before they can see and **chart what actually occurs**.

This record of where actions are taken, decisions are made, inspections are performed, and approvals are required becomes the **"Original State" flow chart**.

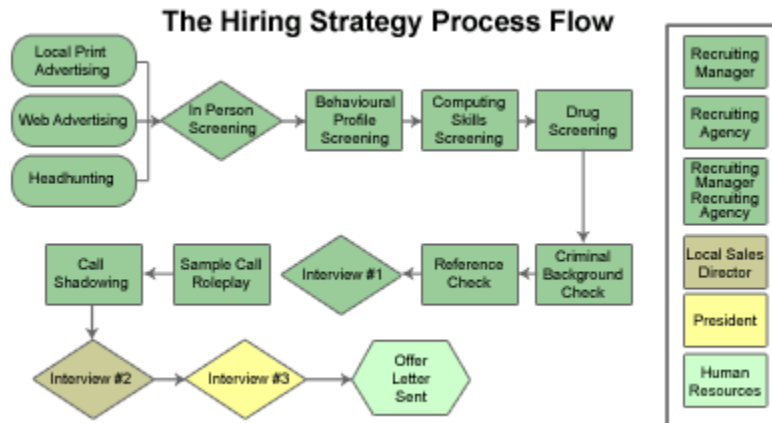
This “Original State” Flow Chart Is Often The First Accurate And Complete Picture Of The Entire Sales Process The Team Members Have Seen.

CAUTION: Distinguish Between Assumptions & Reality

As the team starts work on this first flow chart, they need to be careful to **depict what is really happening** in the Sales process, **and not:**

- ❖ **How People Think The Sales Process Is Working**
- ❖ **How They Would Like It To Work**
- ❖ **How An Instruction Or Manual Says It Should Work**

Only an **accurate and complete** "Original State" flow chart displaying the Sales process **as it is actually working today** can **reveal the improvements** that may be needed.



The goal of this step is for the team to fully understand the Sales Process before making any attempt to change it. Changing a Sales process before it is fully understood can cause more problems than already exist.

Elements Of Developing Accurate “Original State” Flow Charts

The team responsible for creating the “Original State” Flow Chart can define the current situation by answering these questions:

I. Does the Sales Process Flow Chart show exactly how things are done now?

II. If not, what needs to be added or modified to make it a complete and accurate picture of the Sales Process in its current state?

III. Has each person involved in the Sales Process contributed their knowledge of the Sales Process Steps and their sequence?

IV. Are other personnel involved in the Sales process, perhaps as vendors or customers?

Step 7: Improve The Sales Process

Improve the Sales Process by removing redundant or unnecessary activities.

Since often people see the Sales Process on paper in its entirety for the first time in the form of the “Original State” Flow Chart, this can be a real eye-opener which motivates and prepares them to take these first steps in improving the Sales Process.

Removing Redundant or Unnecessary Activities

The “Original State” Flow Chart depiction of how the Sales process “really works” helps team members spot problems in the Sales Process Flow.

- A. They May Locate Steps Or Decision Points That Are Redundant.**
- B. They May Find That The Sales Process Contains Unnecessary Steps.**
- C. They May Discover Procedures That Were Installed In The Past In An Attempt To “Safety Net” The Sales Process After Problems Were Experienced.**

All of these eat up valuable resources!

Bolstering Weak Links

Besides identifying areas where resources are being wasted, the team may find a weak link in the Sales process that they can bolster by adding one or more steps.

Questions That Determine Process Improvements

But before stepping in to make changes in the Sales Process based on this preliminary review of the “Original State” flow chart, the team should answer the following questions for each step of the Sales Process:

- ✚ **Can This Step Be Done In Parallel With Other Steps?**
- ✚ **Does This Step Have To Be Completed Before Another Can Be Started, Or Can Two Or More Steps Be Performed At The Same Time?**
- ✚ **What Would Happen If This Step Were Eliminated?**
- ✚ **Would The Output Of The Process Remain The Same?**
- ✚ **Would The Output Be Unacceptable Because It Is Incomplete Or Has Too Many Defects?**
- ✚ **Would Eliminating This Step Achieve The Sales Process Improvement Objective?**
- ✚ **Is The Step Being Performed By The Appropriate Person?**
- ✚ **Is The Step A Work-Around Because Of Poor Training Or A Safety Net Inserted To Prevent Recurrence Of A Failure?**
- ✚ **Is The Step A Single Repeated Action, Or Is It Part Of A Rework Loop Which Can Be Eliminated?**
- ✚ **Does The Step Add Value To The Result Produced By The Sales Process?**

Benefits Of Reducing Sales Process Inefficiencies

If the answers to these questions indicate waste, the team should consider doing away with the step.

If a step or decision block can be removed without degrading the Sales process, the team is recovering resources and reducing costs.

Eliminating redundant or unnecessary steps confers an added benefit: a decrease in cycle time. Only part of the time it takes to complete most Sales Processes is productive time; the rest is delay. Delay consists of waiting for someone to take action.

Analyzing Potential Redundant / Unnecessary Steps

When you identify a repeated step, determine if the step is a single repeated action, or part of a rework loop which can be similar unproductive activities.

Consequently, removing a step which causes delay reduces cycle time by decreasing the total time it takes to complete the Sales process.

Step 8: Flow Chart The Improved Sales Process

After making preliminary changes in the Sales Process, the team should create a Flow Chart of the “Improved Sales Process.”

Prior to creating a picture of the Improved Sales Process an audit check is necessary.

Improved Sales Process – Audit Check

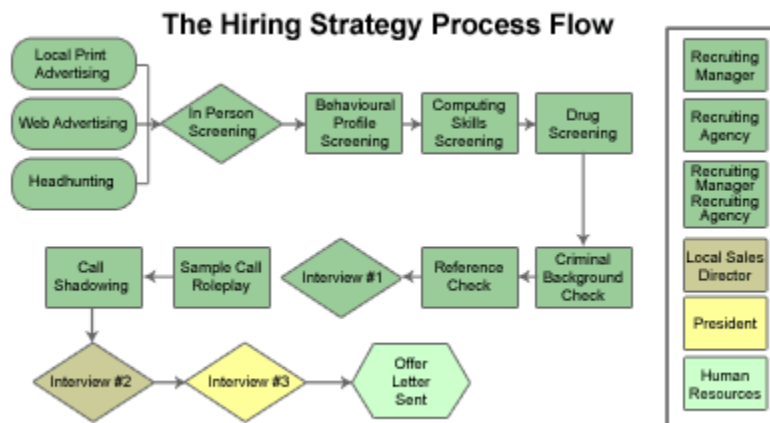
A Process Improvement Audit Check requires verification that the “Improved Sales Process:”

A. Produces Results That Meets The Needs Of The Customer(S) It Serves?

B. Meets The Process Improvement Objective?

C. Meets All Applicable Directives?

If the answers to these audit checks are all "yes," the team should obtain the necessary approval to institute the “Improved Sales Process” Flow Chart as the new standard picture of the Sales process.



Obtaining Process Improvement Approval

If the team needs to be granted approval prior to making the recommended changes, a comparison of the “Improved Sales Process” Flow Chart with the “Original State” Flow Chart can become the centerpiece of a briefing to those in a position to grant approval.

Improved Sales Process – Training

At this point, the people working in the Sales Process must be **trained using the new flow chart** of the Improved Sales Process.

It is **vital** to ensure that they **understand and adhere to the new way of doing business**. **Otherwise**, the Sales process will **rapidly revert to the way it was before** the improvement team started work.

Step 9: Develop A Data Collection Plan

Develop a Sales Data Collection Plan and Collect Baseline Sales Data. These data will be used as the **yardstick for comparison** later in the model.

In the **previous 8 Steps**, the team went through the **development phase** of Sales Process Improvement where all **decisions** were **based on experience, qualitative knowledge** of the Sales process, and perceptions of the best way to operate.

For the **remaining steps** of the Process Improvement Model, a more **Scientific Approach** will be required. These steps of the model will rely on **Statistical Data** which, when **collected and analyzed**, will be used to **make decisions** about the Sales process.

Developing A Data Collection Plan

When the team develops a **Data Collection Plan**, they must first **identify the characteristic** of the product or service that has **to be changed** in order to **meet the objective**.

Identify Data Collection Points

The key to this segment of the model is to use **Sales Process Knowledge** and common sense in **determining where to take measurements**.

The team should ask:

Will The Data Collected At This Point Help Us Decide What To Do To Improve The Sales Process?

Once the team determines **What Data To Collect & Why, How, Where, And When To Collect It**—they have the core elements of a data collection plan.

Step #10: Implement The Data Collection Plan

This begins the **evaluation of the sales process against the process improvement objective** established in Step 4.

The flow chart in Step 6 helps the team determine who should collect data and where in the process data should be collected.

To Implement The Data Collection Plan, the team develops a **Data Collection Sheet**. This **Data Collection Sheet** must include explicit directions on how and when to use it. The team should try to make it as user-friendly as possible.

The Team Can Collect Baseline Data When, And Only When:

- 1) Data Collection Plan Is In Place
- 2) Data Collection Sheet Has Been Developed
- 3) Data Collectors Have Been Trained In The Procedures To Use.

Step 11: Assess Whether The Sales Process Is Stable.

The team creates an Outbound Excellence Control Chart or Run Chart out of the data collected in Step 10 to gain a better understanding of what is happening in the Sales process.

The follow-on actions of the team are dictated by whether special cause variation is found in the Sales Process.

Both the Control Chart and Run Chart tools organize the data and allow the team to make sense of a mass of confusing information.

Control Charts & Run Charts

Outbound Excellence Control Charts are better at revealing whether a Sales Process is stable and its future performance predictable.

However, even if a team begins with the simpler Run Chart, they can convert it to a Control Chart with a little extra work.

These two tools are important because they help teams identify special cause variation in the Sales process.

Whenever an individual or a team repeats a sequence of actions, there will be some variation in the Sales process.

Sales Process Variations

Think about the average amount of time an Outbound Sales Representative spends on the telephone each day contacting prospects and customers.

Although the average time might be 128 minutes, no two days are exactly the same. On one occasion maybe 212 minutes of Customer Contact Time was achieved, another resulted in just 48 minutes.

This is where an Outbound Excellence Control Chart or a run chart can help you analyze the data. Outbound Excellence Control Charts, and to a lesser extent run charts, display variation and unusual patterns such as runs, trends, and cycles.

Data which are outside the computed control limits, or unusual patterns in the graphic display of data, may be signals of the presence of special cause variation that should be investigated.

Sales Process Change vs Variation

For example, say that on a single day the entire sales team's customer contact time was only 48 minutes vs their goal of 128 minutes.

Investigation revealed that on the day the Sales Team achieved only 48 minutes of Customer Contact Time, there was a power outage in the sales office which disabled both the lights and phone service.

The data provided a signal of Special Cause Variation in your Customer Contact Time process.

But what if, over a period of 10 days, a series of times is recorded for a large group of sales people that averaged 48 minutes?

Investigation determines that the Sales Manager responsible for Running the Customer Contact Reports stopped running the

Customer Contact Times hourly, as the processed called for, and began running them just twice a day, making it harder for the sales people to monitor the amount of time they were on the phone contacting customers.

This is not just a variation. The data indicate that your Sales Process has changed.

While this example portrayed an obvious change in the Sales process, subtle changes often occur without the knowledge of the workers.

Locating Cause Of Special Variation

These minor changes produce enough variation to be evident when the data are analyzed. If special cause variation is found in the Sales process, the team is obliged to find the cause before moving on to the next step in the model.

Depending on the nature of the special cause, the team may act to:

- ✚ Remove It
- ✚ Take Note Of It But No Action
- ✚ Incorporate It In The Sales Process

When Special Cause Variation Requires Action To Remove It

When special cause variation reduces the effectiveness and efficiency of the Sales Process, the team must investigate the root cause and take action to remove it.

If the team fails to investigate a signal of special cause variation and continues on with their improvement activities, the Sales Process may be neither stable nor predictable in the future.

This lack of stability and predictability may cause additional problems to occur, preventing the team from achieving the Sales Process Improvement Objective.

Step 12: Assess Whether The Sales Process Is Capable

To assess whether a sales process is capable, the team plots an Outbound Excellence - Sales Process Histogram to compare the data collected in Step 10 against the process improvement objective established in Step 4.

To prepare the Sales Process Histogram, the team superimposes the target value for the Sales process on the bar graph. The target value was established in Step 4 as the Sales process improvement objective.

If there are upper and/or lower specification limits for the Sales Process, the team should plot them also.

(Note: Specification limits are not the same as the upper and lower control limits used in control charts.)

Once the data, the target value, and the specification limits (if applicable) are plotted, the team can determine whether the Sales process is capable .

How To Determine If A Sales Process Is Capable

The following questions can be used to guide the team's thinking:

- ❖ Are There Any Unusual Patterns In The Plotted Data?

- ❖ **Does The Bar Graph Have Multiple Tall Peaks And Steep Valleys?**
- ❖ **Are Other Sales Processes Influencing The Sales Process The Team Is Investigating?**
- ❖ **Do All Of The Data Points Fall Inside The Upper And Lower Specification Limits (If Applicable)?**

If not, the Sales process is not capable.

If An Improved Sales Process Is Capable

If all of the data points fall within the specification limits, the team has to decide whether the shape of the bell curve is satisfactory and whether the data points are close enough to the target value.

If the team is satisfied with both the shape and the clustering of data points, they can choose to standardize the Improved Sales Process or to continue further process development.

Identify-Analyze-Measure-Develop-Improve-Monitor Cycle

From here until the end of the Sales Process Improvement Model the team is going to use a scientific methodology for conducting Sales process improvement called the **Identify-Analyze-Measure-Develop-Improve-Monitor cycle.**

They will plan a change, conduct a test and collect data, evaluate the test results to find out whether the Sales Process Improved, and decide whether to Standardize Or Continue To Improve The Sales Process.

The Identify – Analyze – Measure – Develop – Improve - Monitor cycle. is just that: a cycle. There are no limitations on how many times the team can attempt to Improve The Sales Process Incrementally.

Step 13: Identify Root Causes For Lack Of Capability

Usually the Sales Process Improvement Actions in Step 7 are not enough to make the Sales Process Capable of meeting the objective and the team will have to continue on to Step 13 in search of root causes.

Identify the root causes which prevent the Sales Process from meeting the Sales Process Improvement Objective.

Even if the data indicate that the Sales Process is meeting the Sales Process Improvement Objective, the team should consider whether it is feasible to improve the Sales Process further before going on to Step 14.

Use the Identify-Analyze-Measure-Develop-Improve-Monitor – Repeat cycle here. Additionally, use either our Outbound Excellence – Cause & Effect Diagram or Brainstorming Exercise to generate possible reasons why the Sales Process fails to meet the desired objective.

Determine Cause & Effect

Once the team identifies possible root causes, it is important to collect data to determine how much these causes actually affect the results.

People are often surprised to find that the data do not substantiate their predictions, or their gut feelings, as to root

causes. The team can use a Pareto chart to show the relative importance of the causes they have identified.

Step 14: Plan To Implement The Improved Sales Process

After considering the possible root causes identified in Step 13, the team picks one to work on. They then develop a plan to implement a change in the Sales Process to reduce or eliminate the root cause.

The major features of the plan include changing the Improved Process Flow Chart created in Step 8 and making all of the preparations required to implement the change.

Key Questions For Sales Improvement Plan Development

The team can use the following list of questions as a guide in developing the plan:

- ✚ What Steps In The Process Will Be Changed?
- ✚ Are There Any Risks Associated With The Proposed Change?
- ✚ What Will The Change Cost? The Cost Includes Not Only Money, But Time, Number Of People, Materials Used, And Other Factors.
- ✚ What Workers Will Be Affected By The Change?
- ✚ Who Is Responsible For Implementing The Change?
- ✚ What Has To Be Done To Implement The Change?

Key Questions For Sales Improvement Plan Development

- ✚ Where Will The Change Be Implemented?
- ✚ How Will The Implementation Be Controlled?
- ✚ At What Steps In The Process Will Measurements Be Taken?
- ✚ How Will Data Be Collected?
- ✚ Is A Small-Scale Test Necessary Prior To Full Implementation Of The Change?

- ✚ How Long Will The Test Last?
- ✚ What Is The Probability Of Success?
- ✚ Is There A Downside To The Proposed Change?

Once the Sales Process Improvement Plan is formulated, the team makes the planned changes in the process, if empowered by the team charter to do so.

Otherwise, the team presents the improvement plan to the individual or team to obtain approval to proceed.

Step 15: Modify The Data Collection Plan, if necessary

The data collection plan was originally developed in Step 5. Since the process is going to change when the planned improvement is instituted, the team must now review the original plan to ensure that it is still capable of providing the data the team needs to assess Sales Process Improvements.

Modifying The Data Collection Plan

If the determination is made that the data collection plan should be modified, the team considers the same things and applies the same methodologies as in Step 5.

Step 16: Test The Change & Collect Data

If feasible, the change to the Sales Process should be implemented on a limited basis before it is applied to the entire Sales Organization.

For example, the “Improved Sales Process” could be instituted on a single Sales Team or Sales Division while the rest of the Sales Teams or Sales Divisions continues to use the “Original Sales Process.”

Sales Process Improvement – Data Collection Goals

Whatever method the team applies, the **goals** are **to prove the effectiveness of the change, avoid widespread failure, and maintain organization-wide support.**







In some situations, **a small-scale Sales Process Improvement Test** is **not feasible.** If that is the case, the team will have **to inform everyone** involved of the nature and **expected effects of the change** and conduct training adequate to support a full Sales Organization wide test.

Verify Process Improvement Occurred

The information the team developed in Step 16 provides the outline for the **Improved Sales Process test plan.**

During the Process Improvement Test, it is important to collect appropriate data so that the **results of the change can be evaluated.**

The team should take the following **actions in conducting the test** to determine whether the change actually resulted in process improvement:

-  Finalize The Test Plan.**
-  Prepare The Data Collection Sheets.**
-  Train Everyone Involved In The Test.**
-  Distribute The Data Collection Sheets.**
-  Change The Process To Test The Improvement.**
-  Test And Collate The Data.**

Step 17: Is The Modified Sales Process Stable?

During the test of the new procedure, data were collected. Now the team checks whether the expected results were achieved. The procedures in this step are identical to those in Step 11.

The team uses the data they have collected to check the process for stability by preparing the Outbound Excellence Control Chart or Run Chart.

Since the Sales Process has changed, it is appropriate to re-compute the control limits for the control chart using the new data.

If the data collected in Step 16 show that process performance is worse, the team must return to Step 8 and try to improve the process again. The process must be stable before the team goes on to the next step.

Step 18: Does The Improved Sales Process Meet Its Objective

The procedures are similar to those in Step 12. This is a good place for the team to identify any differences between the way they planned the process improvement and the way it was executed.

Process Objective Evaluation Questions

- 1) Did the change in the Sales Process eliminate the root cause of the problem?
 - a. Whether the answer is "yes" or "no," describe what occurred.

- 2) **Are the data taken in Step 16 closer to the Sales Process Improvement Objective than the baseline data?**
 - a. This indicates how much or how little the Sales Process has improved.

- 3) **Were the expected results achieved?**
 - a. If not, the team should analyze the data further to find out why the Sales Process Performance improved less than expected or even became worse.

- 4) **Were there any problems with the Sales Process - Improvement Plan?**
 - a. The team needs to review the planned improvement as well as the execution of the data collection effort.





Step 19: Standardize The Improved Sales Process

In this step the Sales Process Improvement Team makes some important decisions.

1st They must decide whether or not to implement the change on a full-scale basis.

Full Scale Implementation Analysis

In making this decision, the team should answer the following:

-  Is The Process Stable?**
-  Is The Process Capable?**
-  Do The Results Satisfy Customers?**
-  Does The Team Have Authorization?**

If the answers are affirmative, the Improved Sales Process can be installed as the New Standard Process .

Choosing The Next Course Of Action

The Sales Process Improvement Team must decide what to do next. Even when everything is in place for implementing and standardizing the process, the team still has to choose between two courses of action:

Making Further Sales Process Improvements

Identifying possibilities for making further process changes.

Assuming that resources are available and approval given, the team may choose to continue trying to improve the sales process by reentering the **Identify-Analyze-Measure-Develop-Improve-Monitor –Repeat** cycle

Standardizing The Improved Process w/o Further Efforts

If the team chooses to standardizing the changed process without further efforts to improve it, the team will still need to remain involved:

- ✚ Documenting The Changes
- ✚ Monitoring Process Performance
- ✚ Institutionalizing The Process Improvement

Steps To Standardization

To standardize the changed process:

- 1) **The team initiates documentation changes involving procedures (e.g. Instructions, manuals, and other related documentation.)**
- 2) **Training will have to be developed and provided to make sure everyone is using the new standard process.**

Step 20: Reduce The Frequency Of Data Collection

The team continues to use the data collection plan developed in Step 15, but significantly reduces the frequency of data collection.

Data Collection should be reduced to 25% of what is called for in the data collection plan. The team can then adjust the frequency of measurement as necessary.

The team must periodically assess whether the process remains stable and capable .

Monitoring Sales Process Stability & Capability

To do this, the data collected in Step 16 should be entered into the control chart or run chart and histogram developed in Steps 11 and 12 respectively.

Whichever course of action the team pursues, they should complete documenting the lessons learned during the process improvement effort and making the information available to others.

Phase III Resources

Outbound Excellence - Run Chart

Outbound Excellence - Pareto Chart

Outbound Excellence - Control Chart

Outbound Excellence – Histogram Tutorial

Outbound Excellence - Defining The Objective

Outbound Excellence - Effective Team Meeting

Outbound Excellence - Flow Chart Instructions

Outbound Excellence - Cause & Effect Diagram

Outbound Excellence: Team Charter Work Sheet

Outbound Excellence – Effective Decision Making

Outbound Excellence – How Brainstorming Works

Outbound Excellence –Collecting Sales Process Data

Outbound Excellence - Affinity Diagram Instructions

Outbound Excellence – Sales Process Selection Worksheet

Outbound Excellence – Sales Process Improvement Flow Chart

How to Improve the Job Description Sales Processes of Outbound B2B Telephone Sales Organizations

The Cornerstone For Profitable Sales Growth

The Cornerstone For Achieving & Maintaining Continuous Profitable Sales & Customer Growth Performance From Your Outbound B2B Telephone Sales Organization Is The Development Of An Effective Job Description.

Provides Clear and Accurate Understanding

**An Effectively Written Job Description
Provides Salespeople With A Clear And
Accurate Understanding Of The:**

**“Results” They Will Be Required To Achieve
The Timelines For Achieving Them
The Rewards And Consequences
For Both Achievement And Non-Achievement.**

Maximizes Potential For Achieving Profitable Growth

**Effectively Managed, The Job Description Will Provide Your Sales Leaders
With A Powerful Tool For Efficiently And Effectively Directing And
Managing the:**

- ❖ **Productivity**

❖ Performance

❖ Profitability

Of Your Outbound B2B Telephone Sales Organization.

Why Most Companies Create Job Descriptions

Historically, Job Descriptions Have Been Created Primarily Because:

Laws And Guidelines Regarding The Issue Of Discrimination in Employment Practices Has Made A Job Description Necessary.

How Most Companies Use Job Descriptions

In Most Companies, Job Descriptions Get Their Greatest Use As A Reference Source For Creating Advertising Copy To Fill An Open Sales Position.

The 6 Core Components Of A “Well Written” Job Description

Generally, Job Descriptions Are Considered Well Written If They Include the Following Information:

- ❖ Essential Job Functions
- ❖ Duties & Responsibilities
- ❖ Required Education & Experience
- ❖ Reporting Relationships
- ❖ Compensation
- ❖ Expectation Of Results

Job Descriptions Make Poor Performance Development Tools

Since Most Job Descriptions Don't Detail The Specific Performance Goals Salespeople Will Be Required to Achieve & The Timelines For Their Achievement

Job Descriptions Normally End Up Serving As:

- ❖ A Relatively Effective Tool For Evaluation

- ❖ **A Relatively Poor Tool For Improved Sales Performance**

A More Profitable Approach To The Use Of Job Descriptions

In Companies That Achieve And Maintain Record Levels Of:

- ❖ **Productivity, Performance And Profitability The Job Description Plays A Much More Vital Role In Leading and Directing Outbound B2B Telephone Sales Representatives Through Their Development.**

10 Job Description Tips That Lead To Profitable Sales Growth

Job Descriptions That Lead Outbound B2B Telephone Sales Organization's To Achieve And Maintain Continuous Profitable Sales & Customer Growth Share These 10 Common Characteristics:

1.) Focus On:

- ❖ **Performance**
- ❖ **Results**

2.) Motivate & Inspire Top Sales Prospects

3.) Create A Vision Of:

- ❖ **What They Will Learn**
- ❖ **How They Will Grow**
- ❖ **What They Will Achieve**

4.) Establish A Clear Understanding Of The Organization's:

- ❖ **“Performance Driven” Culture**

5.) Reinforce The Sales Organization's Commitment To:

The “Achievement Of Excellence”

6.) Detail The Exact:

- ❖ **Productivity & Performance Goals**
- ❖ **Minimum Accepted Performance Results**

7.) Identify The Sales Management System As:

- ❖ A “Results Driven” System

8.) Describe The Sales Organization’s:

- ❖ Performance Monitoring Processes

9.) Explain The Performance “Development” Process

- ❖ Focus Talk
- ❖ Written Development Plan
- ❖ Final Written Development Plan

10.) Protect The Company When A Legal Termination Occurs

Why Improve Your Outbound Telephone Sales Job Description

If You Could Develop A Job Description That Included Each Of The 10 Characteristics Listed Above And Then Test And Refine This Job Description On Hundreds Of New Hires Until This Improved Job Description Sales Process Had Proven Its Ability To Maximize The Probability Your New Sales Hires Would:

- ❖ Be Higher Skilled Salespeople Than Previous New Hires
- ❖ Ramp up to Profitability Quicker Than In The Past
- ❖ Exceed Their Forecasted Sales Goals More Often
- ❖ Attract & Retain More New Customers
- ❖ Reduce Unwanted Sales Turnover
- ❖ Significantly Reduce Overall Sales Costs

It Could Prove To Be A Very Valuable Asset For Your Company.

Our 1st Outbound Excellence - Job Description

In 1998 We Developed Our First Outbound B2B Telephone Sales Job Description By Integrating:

- ❖ The 10 Characteristics Shared By The Most Profitable Job Descriptions
- ❖ The “Job Description” Best Practices Of Some Of The Most Profitable Outbound Sales Organizations Of That Time.

Our Current Outbound Sales - Job Descriptions

Since We Designed Our First Job Description In 1998, We Have Refined Our Outbound B2B Telephone Sales Job Descriptions:

- ❖ On 7,500 New Outbound B2B Telephone Sales Representatives
- ❖ With 35 Different Outbound Sales Organizations
- ❖ In 5 Different Countries

Looking For Ways To Increase Profitable Sales Growth

Let us Custom Design a Job Description That Will:

- ❖ Help Your New Hires to Achieve & Maintain Continuous Profitable Sales and Customer Growth Performance.
- ❖ Meet The Unique Business Needs Of Your Outbound B2B Telephone Sales Organization

Outbound Excellence's - Job Description – Sales Processes

Outbound Excellence	
Job Description - Sales Lead Support	
Objective	Responsible For The Day-To-Day "Lead Support" Of The Account Management Team
Basic Functions Of The Job	Lead Generation <ul style="list-style-type: none">a. Identifying Companies That Meet Target Customer Profilesb. Sourcing Required Target Customer Informationc. Downloading Target Information Lead Distribution <ul style="list-style-type: none">a. Managing Target Account Assignmentb. Timely & Accurate Qualified Lead Assignment & Distribution Lead Tracking <ul style="list-style-type: none">a. Logging All Assigned Leads In Performance Tracking Worksheetb. Weekly Follow-Up To Ensure Leads Have Been Contacted Lead Reporting <ul style="list-style-type: none">c. Updating Of Performance Report For All Leadsd. Effective Distribution & Communication Of Lead Reports Lead Support <ul style="list-style-type: none">e. Responsible For Leads Desk EMail Group
Specific Job Responsibilities	Lead Generation <ul style="list-style-type: none">i) Work With Marketing For In-House Leadsii) Work With Credit For Credit Scored Leadsiii) Work With Online For Internet Leadsiv) Use "Primary/Lead Sources" For External Leadsv) Audit Each Lead Against Existing Database Lead Distribution <ul style="list-style-type: none">i) Distribute Leads Based On Requests & Assignment Criteriaii) Create Books For All New Repsiii) Downloaded Leads Into Target Database Lead Tracking <ul style="list-style-type: none">o Track All Assigned Leads – AM Requestso Track All Assigned Leads – New Hire Bookso Track All Re-Assigned Leads – Terminated AMso Track All Incoming Lead Sources – Marketing / Internet Lead Reporting <ul style="list-style-type: none">u Track All Assigned Leads – Existing AM Requestsu Track All Assigned Leads – New Hire Booksu Track All Re-Assigned Leads – Terminated AMsu Assist In Analyzing Historical Data / Trend Analysis

How To Improve The Compensation / Incentive Sales Processes of an Outbound B2B Telephone Sales Organization

The 2nd Component Of A Profitable Sales & Customer Growth Solution Consists Of Two Sets Of Sales Processes:

- 1. Sales Compensation Processes**
- 2. Sales Incentive Processes**

Building On The Foundation Of Excellence

**The 1st Component Of A Profitable Sales & Customer Growth Strategy, The
Job Description:**

- ❖ Improves The Level Of “Quality” And “Performance” That Will Be
Expected & Accepted From Your Outbound B2B Telephone Sales
Representatives**
- ❖ It Also Significantly Increases The Probability That “Continuous” -
Profitable Sales & Customer Growth - Will Be Achieved And
Maintained**

Converting Potential Into Improved Performance Results

With A Job Description Strategy In Place That Will Attract Outbound Sales Representatives With A Much Higher Potential For Achieving Increased Profitable Sales & Customer Growth Performance ...

The Compensation & Incentive Strategy Must Then Be Developed So That It Maximizes The Probability Of Converting The “Potential” To Achieve Continuous Profitable Sales & Customer Growth ...

**Into Increasingly Higher Levels Of Profitable Sales
& Customer Growth Performance & Results!**

7 Reasons Why It's Important To Have Effective Compensation & Incentive Sales Processes

- 1. A Highly Motivated Sales Force Sells More & Sells More Profitably Than A Moderately Motivated Sales Force**
- 2. Rewards & Incentives Direct Focus, Commitment & Results**
- 3. Aligns Sales Force Efforts On Key Organizational Objectives**
- 4. Creates An Equally Effective Balance On Customer Acquisition & Retention**
- 5. Improves The Probability That Continuous Profitable Sales & Customer Growth Will Be Achieved & Maintained**
- 6. Results In Balanced Growth Across Both Target Product & Target Market Segments**
- 7. Develops Long Term Customer Commitment**

9 Common Elements Of Profitable Compensation & Incentive Sales Processes

- 1. Must Be Fair**
- 2. Must Be Simple***
- 3. Must Be Clear**

- 4. Must Be Aligned With Marketing Strategy**
- 5. Must Focus On Target Customer Development**
- 6. Must Motivate Top Performers To Overachieve**
- 7. Should Include A 1st Year Adjustment For New Hires**
- 8. Should Include A "Bluebird" Adjustment**
- 9. Level Of Incentive Should Rise With Level Of Performance**

Sales Compensation – Best Process

- + Compensation Plans Should Be Simple Enough To Fit On A Single Sheet Of Paper - Including Payout Example**

Sales Compensation & Turnover

In A 2007 Survey Of 1,000 Outbound B2B Telephone Sales Representatives:

- + 53.2% Stated They Would Leave Their Current Sales Job If Offered Better Compensation & Incentives**
- + So Within Your Compensation & Incentive Strategy Lies Many Opportunities To Reduce Turnover**
- + And Turnover Remains Among The Top Inhibitors To Achieving & Maintaining Continuous Profitable Sales & Customer Growth Performance**

3 Most Common Types Of Compensation Plans

Outbound B2B Telephone Sales Representatives Have Variations Of 3 Common Compensation Plans To Choose From:

- 1. Salary Only**
- 2. Commission Only**
- 3. Salary + Incentive**

Salary Compensation Plans

Under Salary Compensation Plans:

**Outbound Sales Representatives Are Paid A Fixed Compensation.
The Most Effective Salary Compensation Plans Include Periodic
Short Term Incentives Such As:**

- + Sales Contest Money**
- + Discretionary Bonus**
- + Prizes**

**Salary Compensation Programs Have Proven To Be Effective
In The Following Situations:**

- 1. When A Telephone Sales Representative Sets Appointments For A Field Representative**
- 2. When A Telephone Sales Representative Primarily Services Accounts Won By A Field Representative**
- 3. When An Outbound Telephone Sales Representative Primarily Prospects Leads For Senior Outbound Sales Reps To Develop**
 - + Hunter/Gatherer Concept**

Drawbacks To Outbound Salary Compensation Plans

- 1. Salary Compensation Plans Don't Attract & Retain Top Sales Candidates Because They Put Too Great A Limit On Their Earning Potential.**
- 2. Salary Compensation Plans Often De-Motivate Top Achievers Because They Perceive The Difference Their Compensation & The Compensation Of Underachievers To Be Too Narrow.**
- 3. Salary Compensation Plans Typically Incur The Greatest Selling Costs.**

Commission Compensation Plans

**Under A Commission Type Of Compensation Plan Outbound B2B
Telephone Sales Representatives Are Paid Either:**

- + A Percentage Of Their Invoiced Revenue**

- ✚ A Percentage of Their Invoiced Margin Dollars

Types Of Commission Plans

- ✚ Straight Commission
- ✚ Commission With Draw

Advantages Of Commission Type Compensation Plans

- ✚ Simple To Understand And Administer
- ✚ Pay Is Directly Related To Results Achieved
- ✚ Perception That It Maximizes Incentive

Disadvantages Of Commission Type Compensation Plans

- 1. Sales Representatives Will Focus Their Efforts On Sales Volume Rather Than On Profit**
- 2. Penetration Into Their Installed Base Of Accounts Will Normally Be Relatively Shallow**
- 3. During Sustained Periods Of Low Company Sales, Turnover Will Rise Significantly Due To A Lack Of Loyalty & Dramatic Compensation Swings**
- 4. Customer Service Will Take A Back Seat To Short Term Sales Resulting In Poor Customer Retention Performance**
- 5. The “Sweet Spot” Of The Sales Team Becomes De-Motivated As Sales Management / Leadership Succumbs To Pressure From Seasoned Reps To Transition Top Producing Accounts From Terminated Reps To These More Tenured, Yet Often More Stagnant Sales Representatives**
- 6. High Turnover Invariably Occurs When New Hire Sales Representatives Are Not Provided With Realistic Expectations Regarding 1st Year Earning Potential.**

Salary Plus Incentive - Compensation Plans

Salary Plus Incentive Plans Are The “Most Common” Compensation Plans In Use By Outbound Sales Organizations Throughout North America That Achieve & Maintain The Highest Levels Of Continuous Profitable Sales & Customer Growth.

6 Advantages of Salary + Incentive Compensation Plans

1. Outbound Sales Organizations Compensated By Salary + Incentive Plans Consistently Outperform Sales Organizations Compensated By Salary Or Commission Type Plans

2. Top Performing Outbound Sales Representatives Agree That:

- ✓ **The “Security” Provided By This Plan**
- ✓ **Combined With Its Multiple “Earning Options”**
- ✓ **Provides The Greatest Incentive For Them To Meet & Exceed Their Established Performance Goals**

3. Create A Stronger Bond Of Loyalty Between The Sales Team & Employer

4. Provide A Good Ratio Of Selling Expense To Sales

5. Provide The Organization With Greater Control Of The Variable Income

6. Increase The Organization’s Ability To Direct Targeted Behavior & Increase Targeted Selling Results

13 Keys To Salary + Compensation Plan Success

There Are 13 "Key Components" That Must Be Properly Designed In Order To Maximize The Probability That An Organization’s Salary Plus Incentive Program Will Result In Continuous Profitable Sales & Customer Growth.

- ❖ **Bonus**
- ❖ **Gross Sales**
- ❖ **Commission**
- ❖ **Gross Profits**
- ❖ **Company Car**

- ❖ % Of Returns
- ❖ Type Of Incentive
- ❖ Commission Plus Bonus
- ❖ Incentive Income Factors
- ❖ Accurate Setting Of Salary Levels
- ❖ Recency And Frequency Of Incentives
- ❖ Bonus Pay-Out Levels And Timeframes
- ❖ The Percentage Split Of Salary To Incentive

Developing A Profitable Sales Incentive Strategy

Regardless Of The Compensation Type Chosen, Other Key Incentives Must Be Provided To Maintain High Levels Of Motivation And Achieve Maximum Performance And Profitability.

Key Sales Force Incentives Include:

- ❖ Gifts
- ❖ Trips
- ❖ Awards
- ❖ Security
- ❖ Promotions
- ❖ Recognition
- ❖ Sales Contests
- ❖ Car Allowance
- ❖ Stock Purchase
- ❖ Encouragement
- ❖ Salary Increases
- ❖ Medical Benefits
- ❖ Educational Assistance

Commission Escalator's Accelerate Margin Dollar Performance

Adding A Commission Escalator For Each Margin Dollar A Sales Representative Achieves Over Their Margin Dollar Quota...

Will Get Your Sales Representatives To Press Their Sales Accelerator Rather Than Their Sales Brakes Once Their Quota Has Been Achieved

Value Of Outbound Excellence's Commission Escalator

Customers That Have Added Our Commission Escalator Process To Their Sales Compensation Strategy Have Increased The Margin Dollar Performance Of Their Sales Organization By An Average Of 12%

Develop A "Points Based" Incentive Program

Salespeople Are Highly Motivated By Sales Contests & Sales Incentive Programs So Develop An Incentive Program That Rewards Your Outbound Sales Representatives With Points For Each Key Sales Goal They Achieve:

- ❖ **Margin Dollar Quota**
- ❖ **# Of New Customers**
- ❖ **Rate Of Return**
- ❖ **Customer Contact Time**
- ❖ **New Product / Service Sales**

Incentive Points = Sales Prizes

The More Goals They Exceed / The More Points They Receive!

Incentive Points Are Accumulated & Can Be Redeemed Each Friday

Redeemed For Valuable Prizes Such As:

- ❖ **Vacations**
- ❖ **Wii Systems**
- ❖ **Bose Stereos**
- ❖ **Flat Panel TV's**
- ❖ **Ipod's & Accessories**
- ❖ **Surround Sound Systems**
- ❖ **Tickets To Sporting Events**

The More Valuable The Prize The More Points Needed To Earn It!

Place Prizes Around The Sales Floor So The Sales Representatives Can See Them Many Times Throughout The Day - The Results From This Program Are Tremendous!

Salespeople Live On An Emotional Roller Coaster

Therefore, It Is Important To Provide As Much Positive Incentive and Motivation To Your Outbound Sales Force As Possible.

10 Ways To Maintain Constant Sales Motivation

- + Send Out Motivational Quotes**
- + Provide Daily Encouragement**
- + Recognize Wins - Big And Small**
- + Run Regular Sales Contests**
- + Develop An Incentive Strategy**
- + Create A Motivational Tape Library**
- + Teach Salespeople How To Effectively**
- + Set & Achieve Personal Goals**
- + Talk To Salespeople About**
- + What Interests Them**
- + Tell Your Sales Staff You Appreciate Them**
- + & Tell Them It Sincerely And Frequently**
- + Remember Attitude Determines Altitude**

A Profitable Compensation & Incentive Tip

Sales Contests Improve:

- + Focus**
- + Motivation**
- + Short Term Results**

Use Sales Contests To Drive Targeted Sales Results

- 1. Provide Your Sales Team With A Targeted Promotion & Target Customer / Prospect Galleys**
- 2. Tie The Prizes To The Achievement Of Targeted Sales Results**
- 3. Get The Sales Reps. On The Phone Early**
- 4. Have Your Sales Managers Walk The Floor The 1st 4 Hours**

5. Provide A Comfortable Incentive For The Sales Managers

Developing Team Sales Contests

- 1. Set A Call Time Goal That Each Sales Team Must Meet**
- 2. Start All Teams On The Phones At The Same Time**
- 3. Once Each Team Reaches Their Agreed Upon Call Time Goal
Their Entire Team Gets To Go Home!**

People Care When They KnowYou Care

**Schedule Regular Sessions For Salespeople To Meet Together
To Discuss Ways Of Increasing Sales**

Salespeople Have The Closest Contact With Your Customers

Therefore, Your Salespeople Are The Best Source To Discover:

- ✚ What Customers Need From You In Order To Improve & Grow**
- ✚ New Ideas & Processes Might Develop A New Revenue Stream**

Outbound Excellence's - Compensation & Incentive Solutions

**Our Compensation & Incentive Solutions Have Been Tested & Proven
Effective In Outbound Sales Organizations Throughout North America &
Europe For Over 12 Years.**

Compensation & Incentive Strategies Are “Systems of Processes”

**Therefore, Our Compensation & Incentive Solutions Are Equally Effective
Regardless Of An Organization's Products, Services, Locations, Culture,
Strategy Or Leadership Objectives.**

8 Keys To The Effectiveness of Outbound Excellence's Compensation & Incentive Solutions

- 1. It Is Our Belief That The Most Effective And Profitable
Compensation Plans Are Salary Plus + Incentive Plans With The
Salary Based On Margin Dollar Performance.**

- 2. There Are A Number Of Vital Incentive Components That Must Accompany Any Compensation Plan If It Is To Result In The Achievement Of Continuous Profitable Sales & Customer Growth Performance.**
- 3. A Margin Dollar Compensation Plan Must Be Supported By Processes That Educate Salespeople In The Following Areas:**
 - a. Defining Of Margin Dollars**
 - b. How Margin Dollars Are Calculated**
 - c. How Margin Dollars Differ From Profit Dollars**
 - d. How Margin Dollars Influence The Company's Profitability**
 - e. How An Understanding Of Margin Dollars Can Dramatically Increase A Sales Representative's Personal Wealth.**
- 4. An Organization's Margin Dollar Strategy Should Be Taught, Reinforced & Developed In:**
 - ❖ New Employee Orientation**
 - ❖ New Hire Training**
 - ❖ "Lunch And Learn" Sessions**
 - ❖ Team And Company Meetings**
- 5. An Effective Reporting Structure Should Be Developed That Monitors Orders That Do Not Meet Minimum Margin Dollar / % Goals.**
- 6. Salespeople That Are Sell Products And Services Below Minimum Margin Goals Should Be Identified & Educated And Their Orders Should Be Audited To Ensure Their Development Is Progressing In A More Profitable Manner.**
- 7. For Low Margin Sales That Are Being Affected By Influences Other Than Underdeveloped Selling Skills, These Influences Should Be:**
 - ❖ Identified**
 - ❖ Categorized**
 - ❖ Analyzed**
 - ❖ Reported**
 - ❖ Resolved**

8. Sales Managers Should Be Given The Responsibility To Manage Their Sales Team's Margin Dollar -Improvement Strategy As A Component Of Their Sales Leadership Development Plan.

Outbound Excellence's – Compensation & Incentive Offerings

Let Us Customize A Profitable Outbound Excellence Margin Dollar Based Compensation & Incentive Solution For You

We'll Provide You With A Complete Margin Dollar Based Compensation & Incentive Solution That Will Help Maximize The Sales, Profits & Customer Growth Performance Of Your Outbound B2B Telephone Sales Organization.

Outbound Excellence Margin \$ Based Compensation Plan							
Based on \$24,000 Salary				12% of Net Shipped Margin Dollars			
Step #1 - Net Shipped Dollars (NSD) is Calculated							
Step #2 - Net Shipped Dollars is Multiplied by 12% Commission Rate							
Step #3 - Net Shipped Dollars x 12% is Compared To Base Pay							
Step #4 - Base pay of \$2,000 is Guaranteed							
Step #5 - Add Bonus if Net Margin Dollars Exceeds \$20,000							
Shipped Sales	Margin %	Step #1 Margin \$	Step #2 X.12%	Step #3 Payout	Step #5 Bonus	Step #4 Total pay	Annual Run Rate.
\$ 150,000	9%	\$ 13,500	12%	\$ 1,620	\$ -	\$ 2,000	\$ 24,000
\$ 150,000	10%	\$ 15,000	12%	\$ 1,800	\$ -	\$ 2,000	\$ 24,000
\$ 150,000	11%	\$ 16,500	12%	\$ 1,980	\$ -	\$ 2,000	\$ 24,000
\$ 175,000	9%	\$ 15,750	12%	\$ 1,890	\$ -	\$ 2,000	\$ 24,000
\$ 175,000	10%	\$ 17,500	12%	\$ 2,100	\$ -	\$ 2,100	\$ 25,200
\$ 175,000	11%	\$ 19,250	12%	\$ 2,310	\$ -	\$ 2,310	\$ 27,720
\$ 200,000	9%	\$ 18,000	12%	\$ 2,160	\$ -	\$ 2,160	\$ 25,920
\$ 200,000	10%	\$ 20,000	12%	\$ 2,400	\$ 1,000	\$ 3,400	\$ 40,800
\$ 200,000	11%	\$ 22,000	12%	\$ 2,640	\$ 1,000	\$ 3,640	\$ 43,680
\$ 250,000	9%	\$ 22,500	12%	\$ 2,700	\$ 1,000	\$ 3,700	\$ 44,400
\$ 250,000	10%	\$ 25,000	12%	\$ 3,000	\$ 1,000	\$ 4,000	\$ 48,000
\$ 250,000	11%	\$ 27,500	12%	\$ 3,300	\$ 1,000	\$ 4,300	\$ 51,600
\$ 300,000	9%	\$ 27,000	12%	\$ 3,240	\$ 1,000	\$ 4,240	\$ 50,880
\$ 300,000	10%	\$ 30,000	12%	\$ 3,600	\$ 1,500	\$ 5,100	\$ 61,200
\$ 300,000	11%	\$ 33,000	12%	\$ 3,960	\$ 1,500	\$ 5,460	\$ 65,520
\$ 350,000	9%	\$ 31,500	12%	\$ 3,780	\$ 1,500	\$ 5,280	\$ 63,360
\$ 350,000	10%	\$ 35,000	12%	\$ 4,200	\$ 1,500	\$ 5,700	\$ 68,400
\$ 400,000	9%	\$ 36,000	12%	\$ 4,320	\$ 1,500	\$ 5,820	\$ 69,840
\$ 400,000	10%	\$ 40,000	12%	\$ 4,800	\$ 2,000	\$ 6,800	\$ 81,600
\$ 450,000	8%	\$ 36,000	12%	\$ 4,320	\$ 1,500	\$ 5,820	\$ 69,840
\$ 450,000	9%	\$ 40,500	12%	\$ 4,860	\$ 2,000	\$ 6,860	\$ 82,320
\$ 500,000	8%	\$ 40,000	12%	\$ 4,800	\$ 2,000	\$ 6,800	\$ 81,600
\$ 500,000	9%	\$ 45,000	12%	\$ 5,400	\$ 2,000	\$ 7,400	\$ 88,800

1) ***To Maximize Compensation - Sell Value Over Price - Do NOT Discount!***
 2) Net Shipped Dollars = MTD Shipped Margin Dollars - MTD Returns
 3) Compensation for Vacations, Training & Other Paid Absences will be based on weekly rate from previous quarter.

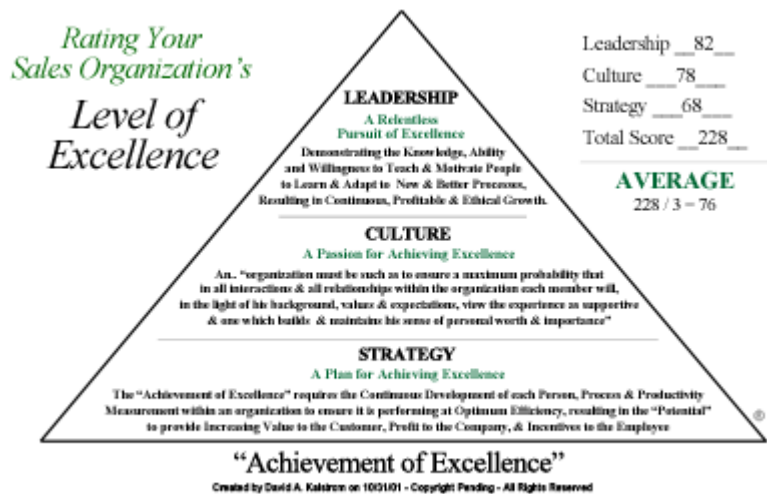
Improving the Recruiting Strategy - Sales Processes of Outbound B2B Telephone Sales Organizations

The 3rd Component of a Profitable Sales & Customer Growth Solution Is The Recruiting Strategy

With A More Effective Job Description And Compensation Plan In Place You Have Now Significantly Increased The “Potential” To Improve The Productivity, Performance & Profitability Of Your Outbound B2B Telephone Sales Organization.

The Human Side Of The Enterprise

We Now Add In The Human Side Of The Enterprise And Watch The Formula For Increasing Profitability Come Into View:



Formula For Improved Sales Growth Performance

Improve Your Salespeople + Improve Your Sales Processes

You'll Improve Your Profitable Sales Growth Performance

The Importance Of Hiring "The Right" Salespeople

**The Most Profitable Strategy In The World Won't Produce
Significant Profitable Sales Growth Without The Right
Salespeople To Effectively Execute It!**

How To Attract & Retain The Top 10% Of Sales Candidates

**We Will Now Discuss How To Attract & Retain Salespeople That Have The
Knowledge, Skills, & Willingness To Turn The Potential For Achieving &
Maintaining Continuous Profitable Sales Growth Into Actual Profitable
Sales Growth Results.**

Attracting The Top 10% Of Sales Candidates

**If It Were Possible To Attract & Retain The Top 10% Of Sales Candidates
In The Job Market At Any Given Time, What Impact Would This Single
Component Have On Your Sales Organization's Ability To Achieve &
Maintain Continuous Profitable Sales & Customer Growth Performance?**

Improving "New Hire" - Sales Performance

**There Are A Number Of Very Simple Processes That Can Be Added To Any
Outbound B2B Telephone Sales Recruiting Strategy That Will Quickly:**

- ❖ **Reduce Bad Hires**
- ❖ **Increase "Speed to Profitability"**
- ❖ **Increase # of New Hires that are:**
 - **Highly Energized**
 - **Highly Focused**
 - **Highly Productive**
 - **Highly Profitable**
- ❖ **Increase Profitable Sales & Customer Growth**

Cost Of Bad Hires

Before Getting Into The Processes That Lead To More Profitable Hiring Decisions, Here's A List Of Reasons Why Improving The Recruiting Processes Of An Outbound Sales Organization Is So Important:

A Bad Hiring Decision ...

- ❖ **Lowers Morale**
- ❖ **Increases Turnover**
- ❖ **Is Extremely Costly**
- ❖ **Absorb And Waste Resources**
- ❖ **Lowers Leadership Credibility**
- ❖ **Deteriorates Positive Sales Culture**
- ❖ **Decrease Customer Retention Rates**
- ❖ **Frustrates Top Producing Salespeople**

Ideal Sales Candidate Profile

By Analyzing The Background, Experience, Behavioral Traits & Performance Of Over 5,000 Outbound B2B Telephone Sales Representatives:

We Have Been Able To Identify The Profiles Of Candidates That Have The Highest Probability Of Success & Failure Selling Products & Services By Prospecting Over The Telephone For New Customers.

Chances Of Selecting The Best Sales Candidates is 1 in 16

Of The 16 Possible Sales Profiles One Single Profile Matches 76% Of The Most Profitable Outbound B2B Telephone Sales Representatives.

The Cost Savings Of Reducing Bad Hires

With Rising Sales Costs, Declining Profit Margins, And An Average Turnover Rate Of Over 50% For Outbound B2B Telephone Sales Representatives ...

**❖ How Important Is It To Ensure This Single Component,
The Outbound Excellence Ideal Sales Candidate Profile
Is Part Of Your 2008 Recruiting Strategy?**

**Critically Important If Your Goal Is To Achieve & Maintain
Continuous "Profitable" Sales & Customer Growth Performance.**

Eliminate 70% Of Bad Hire Costs

**Adding This “Single Process” The Ideal Sales Candidate Profile
To Your Existing Sales Growth Strategy Can Eliminate Up To
70% Of The Costs You Have Previously Spent Recruiting, Hiring,
Training and Developing "Bad Hires."**

2 Most Effective Recruiting Sources

**The First Step In Developing A More Profitable Recruiting Strategy Is To
Understand The Recruiting Sources That Provide The Greatest Return On
Your Recruiting Investment Dollar:**

✚ Referrals = 44%

✚ Search Firms = 33%

Referrals Provide The Greatest Recruiting ROI

- 1. Referral Programs, When Developed And Implemented Effectively,
Consistently Result In Attracting And Retaining Sales Candidates
That Produce The Greatest Return For Your Recruiting Investment
Dollar.**
- 2. Referrals Are The Most Dependable, Demonstrate The Best Work
Ethic And Achieve Quicker “Speed To Profitability.”**
- 3. When An Refers A Sales Candidate To An Organization, The
Referral Is A Reflection Of The Employee That Referred The
Candidate Therefore, Good Outbound Sales Representatives Will Be
Selective In The Candidates They Refer.**

- 4. Referrals Usually Have A Better Understanding of the Organization's Strengths & Weaknesses So They Have More Realistic Expectations Of The Benefits, Challenges & Potential Rewards**
- 5. Sales Representatives That Refer Candidates Have A Vested Interest In Their Referrals So They Have A Tendency To Mentor Their Referrals In Understanding "Key" Developmental Areas:**

- + Who Are The Key Contacts**
- + How To Configure Solutions**
- + How To Generate Quotes**
- + How To process Orders**
- + How To handle Customer Requests**
- + Providing Assistance In Ramping Up Their Product Knowledge As Well As Their Selling Skills**

Recruiting Strategy - Incentives

One Way To Increase the # of Qualified Referrals Is To Provide Your Sales Team With A \$250.00 Referral Fee For All Sales Referrals Who Successfully Complete Their 90 Day Probationary Period.

Recruiting Strategy - Job Fairs

Another Key Process That Can Significantly Increase The Number of Quality Referral Candidates You Hire Is To Add Our Job Fair Components To Your Existing Recruiting Strategy.

Job Fair - 5 Key Success Factors

Here Are A Number Of "Key Success Factors" That Must Be Adhered To When Developing & Implementing Profitable Job Fair Strategies:

- + Hold Your Job Fairs On A Regular Basis**
- + Advertise & Brand Your Job Fairs Effectively**
- + Use Our "Ideal Sales Candidate Profile" To Quickly Identify Candidates With The Highest Probability Of Success.**

- ✚ Make It A Mandatory Requirement For All Sales Managers With Open Positions, To Attend The Job Fairs So They Can Conduct Immediate 1st Interviews With Top Candidates.**
- ✚ Hold Off-Site Job Fairs - Ranging From City Job Fairs At Convention Centers To Career Job Fairs At Colleges.**

5 More Profitable Recruiting Processes

- 1. Implement A Process In Your Recruiting Strategy That Will Provide You With “Automated Electronic Notifications” When Resumes’ Are Posted To Key Internet Job Sites That Meet Your - Ideal Sales Candidate Background and Profile Criteria.**
- 2. Obtain Outbound Excellence’s Recruiting “Call Guideline” To Maximize The Number Of Ideal Sales Candidates You Convert From Resume Posters To “Top Revenue Producers”**
- 3. Establish An Internship Program With Local Colleges And Universities.**
- 4. Relentlessly Pursue The Development Of Internal Non-Sales Candidates To Fill Your Outbound Telephone Sales Positions.**
- 5. Contact Outbound Excellence For Other Proven Processes That Will Increase The Profitable Sales & Customer Growth Produced By Your Future New Hires.**

The Benefits Of Partnering With Outbound Excellence To Improve Your Existing Recruiting Strategy

In Instances Where We Have Integrated Our:

- ✚ Ideal Sales Profile**
- ✚ Job Fair Program**
- ✚ Prospecting Call Guideline**
- ✚ Automated Resume Notification**
- ✚ Referral & Referral Incentive Processes**

To The Existing Recruiting Strategies Of Outbound B2B Telephone Sales Organizations:

- + New Hire Sales Performance Increased by 32%,**
- + Recruiting Costs Decreased By An Average of 37%**

Outbound Excellence Customized Solutions

Outbound Excellence Will Provide You With A Customized Recruiting Solution That Will ...

- + Result In Your Ability To Attract & Retain The Top 10% of Sales Candidates In Your Job Market**
- + Help Maximize The Growth Of Your Sales Organization's Profitable Sales & Customer Growth Performance.**

**Improving the
Hiring / Sales Force Sizing
Sales Processes
of
Outbound B2B Telephone
Sales Organizations**

**The 4th Component of a Profitable
Sales & Customer Growth Solution Is The
Hiring / Sales Force Sizing Strategy**

Our Belief That Any Organization's Most Valuable Asset - Is Its People Has Led Us To Conduct Extensive Research & Testing Into Improving The Processes Used To Hire Outbound B2B Telephone Sales Representatives

The Goal Of A Profitable Hiring Strategy

The Goal Of The Hiring Process Is To Attract Sales Candidates That Have The Greatest Probability Of Uncovering And Profitably Meeting Target Customer Needs Based On Their Knowledge, Skills & Abilities And The Sales Organization's:

- ✚ Compensation & Incentives
- ✚ Goals & Objectives
- ✚ Culture & Management Style
- ✚ Ability To Develop The New Hires To Achieve Maximum Productivity, Performance & Profitability.

2 Reasons Why It's Critical To Develop & Implement An Effective Hiring Strategy

For Over 10 Years, Sales Leaders From Outbound Sales Organizations Throughout North America Have Rated "Hiring" As The Most Important Decision Their Sales Organization Makes

- ✚ The Reason Is That Hiring Decisions Have The Greatest Impact On Sales Success

Understanding, Experience, Ability, Desire

The 5 Most Effective Ways Of Assessing A Sales Candidates Understanding, Experience, Ability & Desire:

1. Behavioral / Aptitude Testing
2. Prospecting / Sales Exercises
3. Analyzing & Auditing Resume
4. Verifying References
5. Previous Job Related Experience

Take The Time To Hire Right

It Seems That It Is Too Often The Case That Outbound B2B Telephone Sales Organizations Are Not Meeting Their Projected Net Hire Goals Which

Creates An Increasing Urgency To Hire New Salespeople As Soon As Humanly Possible.

Rushing To Hire More Salespeople Results In Outbound Sales Organizations Filled With Moderately Productive and Minimally Profitable Sales Representatives.

Hurried Hiring Wastes Significant Costs

As The Cost Of Hiring The Wrong Salespeople Will Far Outweighs The Cost Of Time Spent Finding The Right Ones

6 Common Hiring Mistakes

1) Hiring Based On Results Of Internal Interviews

- ✚ Historical Accuracy 15.2%**

2) Rush To Hire Syndrome

- ✚ Rush To Replace An Unexpected Termination**
- ✚ Rush To Increase Headcount To Make Quota**

3) Being Sold By Salespeople

- ✚ Sales Managers Should Be Involved In Hiring New Sales People**
- ✚ However, The Easiest Person To Sell Is Another Salesperson**
- ✚ The Majority Of Sales Managers Are Ex-Sales Representatives**

4) Hiring Without Following A Formalized Hiring Process

- ✚ Behavioral Profile**
- ✚ Knowledge / Skills / Abilities / Willingness Testing**
- ✚ Ride-A-Longs With Existing Reps**

5) Not Terminating Bad Hires In Training

- ✚ Make Hiring Decisions Contingent On Passing Training**

6) Not Having Candidates "Try Before They Buy"

- ✚ Have Candidates Spend A 1/2 Day Observing**
- ✚ Have Candidates Ride With 2-3 Reps**

- ✚ **Allow The Candidate To Ask Any Questions**
- ✚ **Allow Reps To Answer Openly & Honestly**
- ✚ **Have The Reps Question The Candidates**
- ✚ **Obtain Input From All Reps**

Don't Be Sold By A Bad Hire

- 1) **Follow Your Hiring System**
- 2) **Refuse To Hire Sales Candidates That Don't Meet Your Hiring System Requirements**
- 3) **You're Hiring Experienced Salespeople**
 - ✚ **It's Their Job To Sell**
- 4) **Many Sales Candidates Can Sell Themselves In An Interview**
 - ✚ **Far Better Than They Could Ever Sell Your Company's Products & Services**

8 Ways To Improve The Profitability Of Your Hiring Strategy

Implement The Following Processes To Your Existing Hiring Strategy:

- ✚ **Hire In Targeted Groups**
- ✚ **Ideal Candidate Profiling**
- ✚ **Self Motivation Assessments**
- ✚ **Use OE "Prospecting Exercise"**
- ✚ **Character Confirmation Checks**
- ✚ **Drug Testing & Background Checks**
- ✚ **Conduct Standardized Exit Interviews**
- ✚ **Knowledge + Skills + Abilities Assessments**
- ✚ **Behavioral Interviewing Questioning Format**
- ✚ **Don't Mix Hiring Experienced & Inexperienced Reps.**

Ideal Sales Candidate Profiling

Here Are The 15 Common Traits Of New Hire Sales Candidates That Have proven To Achieve Exceptional Sales & Customer Growth Performance:

Assertive	Persuasive	Extraverted
Competitive	Self Confident	Culture Fit
Ability To Put Others At Ease	Dedicated To Self Improvement	Desire To Serve Others
Effective Communication Skills	Strong Ethical Values	Desire & Willingness To Listen
Good Time / Task Management Skills	Highly Motivated / Strong Work Ethic	Ability To Analyze & Understand Key Customer Information

Ideal Sales Candidate Assessment Tools

There Are Effective Assessment Tools That Can Accurately Measure The Level Of Each Of These Traits That Exist In A New Hire Sales Candidate.

Outbound Excellence's - Ideal Sales Candidate Profiler

We Believe Our Outbound Excellence - Ideal Sales Candidate Profiler Is The Most Accurate, Effective & Profitable Process On The Market For Identifying Sales Candidates With The Highest Probability For Achieving & Maintaining Continuous Profitable Sales & Customer Growth Performance.

The 3 Most Common Hiring Philosophies

- ✚ Hire Inexperienced Salespeople
- ✚ Hire Experienced Salespeople
- ✚ Just Fill The Seats Our "System" Will Take Care Of The Rest

1) Hire Inexperienced Salespeople

To These Companies, Their Training Programs Are Strategic Advantages Over Their Competitors.

Advantages

- ✚ Easier To Manage
- ✚ More Eager To Learn
- ✚ Lower Overall Sales Costs
- ✚ Fewer Bad Habits To Break
- ✚ Better Long Term Investment
- ✚ Better Molded To Company Culture
- ✚ Commitment Is Rewarded With Loyalty

Disadvantages

- ✚ Often Less Disciplined
- ✚ Higher Training Costs
- ✚ Slower "Speed To Profitability"
- ✚ Lack Of Skills And Experience
- ✚ Higher Risks To Turnover Customers
- ✚ May Be Using Opportunity
- ✚ As A Stepping Stone

2.) Hire Experienced Sales People

To These Companies, Speed To Contribution Is Their Primary Objective

Advantages

- + Established Selling Skills**
- + Quicker Speed To Profitability**
- + More Realistic Job Expectations**
- + Possible Product / Market Experience**
- + Possible Existing Customer Relationships**

Disadvantages

- + Higher Overall Sales Costs**
- + Harder To Break Bad Habits**
- + Less Willingness To Conform**
- + Greater Challenge To Manage**
- + Possible Loyalty / Instability Traits**
- + Ability To Hide Flaws In Hiring Process**

3) Just Fill The Seats

These Companies Believe Their "System" Will Make
The New Hires Successful.

- + Highly Ineffective & Unprofitable Approach**

Should You Hire Experienced Or Inexperienced Salespeople?

A Key Question That Often Arises When Outbound Sales Organizations
Seek To Recruit And Hire New Salespeople Is Whether To Hire Candidates
That Are New To The Sales Industry Or Whether To Hire Experienced
Salespeople.

Questions To Help Answer Experienced / Inexperienced

In Determining Whether To Hire Experienced Or Inexperienced Salespeople

- 1. Which Type Of Person Is The Compensation Plan Designed To Attract & Retain?**
- 2. Does The Compensation System Allow For Compensation Exceptions?**
- 3. Is There Adequate Time To Recruit & Hire Experienced Salespeople?**
- 4. Is There A Budget For A Search Firm's Fees?**
- 5. Are There Adequate Processes In Place To Assess UEAD Levels?**
- 6. Is The Sales Training Designed For Tactical Or Strategic Selling?**
- 7. What Is The Skill Level Of The Trainer vs Experienced New Hires?**
- 8. Are New Salespeople Being Hired To Meet Short Term Or Long Term Objectives?**
- 9. Is The Goal To Attract New Customers Or Expand Existing Customers?**
- 10. Are New Salespeople Being Hired To Develop A New Market Or Sell A New Product?**
- 11. Would Previous Product / Market Experience Increase Profitable Sales Growth?**
- 12. Would Experienced Reps. Be Able To Leverage Existing Customer Relationships?**
- 13. What Is The Current Sales Culture & How Would Each Type Fit The Current Culture?**
- 14. How Would Experienced Reps React To A Rep Hired With A Compensation Exception?**
- 15. Would It Be Disruptive To Add Reps That Are Set In Their Ways & Resistance To Change?**
- 16. Would The Sales Organization Benefit More From Energy Or Experience?**

17. Could Internal Reps Be Developed Vs Hiring New Experienced Reps?

18. What Level & Type Of Sales Management Support Will Develop The New Hires?

19. Is The Sales Management Team Experienced Enough To Develop & Manage Experienced Reps?

20. Is It A Tactical Or Strategic Sale?

21. Do Your Target Customers Require / Expect A High Level Of Technical Knowledge?

Focus on Understanding, Experience, Ability & Desire

The Majority Of Valid Data By Which You Can Predict A Sales Candidate's Success, Is Associated With The Sales Candidate's UEAD:

- A) Understanding
- B) Experience
- C) Ability
- D) Desire

Measuring Understanding, Experience, Ability & Desire

One Of The Most Accurate Ways To Measure A New Hire Sales Candidate's Understanding, Experience & Ability Is To Conduct The Following Pre-Hire Selling Skills Testing Exercise:

Inexperienced Sales Candidates

- ✚ Break Up The Elements Of A Tactical Sale**
- ✚ Contact – Qualify – Present – Close - Grow**
- ✚ Develop 5 Questions For Each Element**

Experienced Sales Candidates

To Measure The Understanding, Experience, Ability Of Experienced / Strategic / Relationship - New Hire Candidates, Add The Following 3 Elements To The Exercise Above:

- ✚ Pre-Call Research
- ✚ Pre-Call Planning
- ✚ Pre- Call Strategy

Measuring Desire, Commitment & Work Ethic

To Accurately Measure A New Hire Sales Candidate's Desire, Commitment & Work Ethic, As Well As Their Selling Skills:

- ✚ Develop A Prospecting Exercise

Pre-Hire Prospecting Exercise

A Pre-Hire Prospecting Exercise, Designed & Implemented Effectively, Provides Organization's With A "Bullet-Proof" Tool For Measuring Any New Sales Candidate's "Exact Level" Of Understanding, Experience, Ability & Desire, and the System is "Scam Proof."

Another: Understanding, Experience + Ability Exercise

1. Have Each New Hire Sales Candidate Write The Names Of 3 Current Or Most Recent Top Buying Accounts.
2. Have Them Provide You With The Following "Non Confidential" Information On Each Account:
 - ✚ What Is Their Annual Sales Volume
 - ✚ Is This Company The Parent
 - ✚ What Are Their Key Subsidiary Companies
 - ✚ What Is Their Major Line Of Business
 - ✚ Name 3 Of Their Products Or Services
 - ✚ Name 2 Of Their 2008 Strategic Initiatives

Base Hiring Decision On Credibility & Trust

- 1. Customer's Base Their Buying Decisions In Good Part On A Sales Representative's Ability To Establish Credibility & Trust.**
- 2. We Would Make Wiser Hiring Decisions If We Made Our Decisions Based On Verifiable Facts That Confirm The Character & Establish A Known Level Of Trust In Our New Hire Sales Candidates.**
- 3. Verifiable Facts Are The Most Reliable Data For Testing A Sales Candidate's Character**

Check For Self Motivation / Desire Indicators

Before Hiring Any Sales Candidate Identify Their Level Of Dedicated Commitment To Personal & Professional Improvement.

- + Ask New Hires About Their Favorite Sales Books**
- + Find Out Their Favorite Motivational Speakers**
- + Ask What Seminars Have They Attended**
- + Ask About Their 3-5 Year Goals**

Unmotivated Salespeople = Unproductive & Unprofitable Salespeople

Don't Be Misled By Generalizations

- + Ask For Details About Employment History**
- + Listen For Ambiguous Phrases & Voids**
- + Generalizations Are Used To Hide Unstable Work Histories**
- + Phrases Such As - "Better Opportunity Elsewhere" Are Often Used To Divert An Interviewer's Attention Away From Unsuccessful Selling Experiences**
- + Keep Probing If You Have Any "Credibility Doubts"**

Drug Testing & Background Checks

Require All Applicants To Pass A Drug Test As A Contingency For Employment.

- + Drug Tests Are Administered By An External Source**
- + Results Are Usually Available Within 48 Hours**
- + Utilize An Outside Firm To Conduct Background Checks**
- + Results May Take Three To Five Days For Applicants With Diverse Histories Including Out Of State Employment Or Education**

15 Tips For Conducting Effective Sales Interviews

- + Be Courteous**
- + Ask Prepared Questions**
- + Conduct Panel Interviews**
- + Set Aside At Least 45 Minutes**
- + Select Panel Members New Hire Would Regularly Interact With**
- + Have Each Panel Member Ask A Different Section Of Questions**
- + Have Panel Members Ask Each Candidate The Same Questions**
- + Start By Establishing Mutual Respect**
- + Talk Time: 80% Candidate / 20% Interviewer**
- + Ask Broad Open-Ended Questions & Probe**
- + Use A Behavioral Style Questioning Format**
- + Ask How The Applicant Feels About People**
- + Question Job Objectives & Probe Deeply Here**
- + Ask How The Applicants Views Themselves**
- + Give Applicant An Opportunity To Elaborate**

Behavioral Interview Questioning

The Best Indicator Of What A Salesperson Will Do For You Is What The Salesperson Has Done In Previous Sales Opportunities

One Of The Most Effective Methods For Accurately Identifying What A Sales Candidate Has Done Successfully In The Past Is Through Behavioral Interview Questions.

Recommended Behavioral Interview Questions

In Order To Obtain The Necessary Information That Will Allow You To Accurately Analyze A Sales Candidates Understanding, Experience, Ability & Desire, Each Candidate Should Be Asked Questions From Each Of The Following Categories:

- + Thoughts About Their Job
- + Thoughts About Other People
- + Genuine Job Objectives
- + Regard Of Self
- + Selling Skills
- + Ability To Respond Under Pressure

Sales Candidate's - Thoughts About Their Job

- + Tell Me About Your Last Job?
- + What Were Some Things You Liked?
- + What Were Some Of The Minuses?
- + Were You Able To Maximize Your Abilities?
- + Rank This Job With Others You Have Held?
- + What Are Your Reasons For Ranking It So?
- + How Many Hours Should A Person Work?
- + What Is A Satisfactory Attendance Record?

Sales Candidate's - Thoughts About Other People

- ❖ What Were Your Supervisor's Strengths?
- ❖ What Were Your Supervisor's Weaknesses?
- ❖ How Were You Treated By Other Managers?
- ❖ How Would Your Manager Rate Your Skills?
- ❖ What Did She Feel You Did Particularly Well?

- ❖ **What Were Her Criticisms Of Your Work?**
- ❖ **How Do You Feel About Those Criticisms?**
- ❖ **What Kind Of People Do You Enjoy Most?**
- ❖ **What Kind Of People Are Difficult To Work With?**

Sales Candidate's - Genuine Job Objectives

- **What Do You Find Most Satisfying In A Job?**
- **What Things Do You Try To Avoid In A Job?**
- **What Was Missing From Your Last Job?**
- **What Is Your Overall Career Objective?**
- **What Position Will You Hold In 5 Years?**
- **What Are Your Current Salary Expectations?**
- **How Have You Arrived At This Figure?**

Sales Candidate's - Regard of Self

- ✓ **How Would You Describe Yourself?**
- ✓ **What Characteristics Make You Successful?**
- ✓ **What Traits Would You Like To Overcome?**
- ✓ **What Skills Are You Most Confident With?**
- ✓ **What Skills Would You Like To Improve?**
- ✓ **What 4 Things Motivate You Most In Life?**

Sales Candidate's - Selling Skills

What Would You Say If A Prospect Said:

- **What Are You Selling**
- **Your Price Is Too High**
- **I Am Satisfied With My Present Supplier**
- **Just Send Me Some Information**
- **I'm Not Interested**

Sales Candidate – Ability To Respond Under Pressure

Ask The Sales Candidate This Question:

“Tell Me About The Biggest Sale You Ever Made”

- + Keep Asking More Questions**
- + Keep Pushing For More Information**
- + Act Like You’re Not Satisfied With An Answer**
- + Keep Asking “Why?”**
- + Sit & Stare**
- + Schedule Interruptions**
- + Make The Applicants Squirm A Bit**
- + See How They Handle It!**

The Objective Of This Exercise Is To Put The Sales Candidates Under The Same Level Of Pressure They Would Feel Prospecting Over The Phone For New Sales Opportunities. Better To Find Out This Important Data Point Before Investing A Great Deal Of Time & Money In Any Sales Candidate.

The 4th Component of a Profitable

Sales & Customer Growth Solution Includes

Sales Force Sizing Strategy

Sales Force Sizing

Within Your Hiring Strategy Lies A Hidden Component That Has Great Power & Control Over The Effectiveness & Profitability Of Your Sales Organization.

- 1. Although Not Directly Related To The Hiring Process, It Has Complete Dictatorship Over It**
- 2. It Holds The Power Within Itself Alone To Determine Whether Or Not Entire Corporations Meet Their Annual Sales, Profit & Customer Growth Goals**

- 3. This Component Has Been Studied And Developed In Thousands Of Companies For Over A Decade**
- 4. Yet Over 90% Of The Outbound B2B Telephone Sales Organizations In America Do Not Have A Formal Documented Process In Their Sales Strategy To:**
 - i. Analyze It**
 - ii. Research It**
 - iii. Develop It**

This Hidden Component Is How To

Accurately Size Your Outbound Sales Organization

10 Steps To Profitably Sizing Your Sales Force

- 1. Identify Your Target Market Segments**
- 2. Identify Your Target Customer Profile For Each Target Market Segment**
- 3. Identify The # Of Target Companies In Each Target Market Segment**
- 4. Analyze Existing Buying Customers To Determine The # Of Buying Companies In Each Target Market Segment**
- 5. Calculate Your Current Marketshare In Each Target Market Segment**
- 6. Calculate The Average # Of Accounts Managed By The Average Rep In Each Market Segment**
- 7. Calculate The Range Of Contacts Needed To Effectively Qualify Or Disqualify Each Account (E.G. 3-8)**
- 8. Calculate The # Of Sales Representatives Needed To Effectively Contact & Manage Each Segment Of Target Accounts**
- 9. Prioritize Segments In Order Of Desired Market Expansion**
- 10. Size Sales Force Accordingly**

Sales Force Sizing Surprise

Note: You Will Be Surprised To Discover That On Average, Over 50% Of Your Target Market Segments Are "Mis-Sized"

Important "Up-Sizing & Down-Sizing" Information

- 1. Increased Profits Usually Requires An Increased Sales Cost Ratio**
- 2. Continuous Profitable Sales Growth & Cost Containment Are Historically Not Compatible**
- 3. Once Sales Sizing Is Determined Hire And Train All At Once**
- 4. If Reducing Sales Headcount Do It All At Once & As Soon As Possible**
- 5. Use "Industry Benchmarks" - To Calculate ROI On New Hires**
- 6. Average New Hire 1st Year Sales = 135% Of Break Even Sales**
- 7. In A Well Developed And Balanced Sales System**
- 8. A Key Element In Maximizing 1st Year Growth Is Proper Customer / Market Assignment**
- 9. Once A Sales Organization Is Sized Properly And Is Well Balanced**
- 10. Productivity Improvements Will Provide 2.5 Times The Profit Improvement**
- 11. Of Adding Additional Headcount**
- 12. New Major Product Releases Will Cut Sales Efforts In Selling The Standard Product Line By 35 - 50% - So Don't Assume You Can Launch A Major New Product Line & Hit High Growth Goals Without Adding Headcount**
- 13. Consider Hiring Temporary / Contract Sales People For Major Launch Efforts**
- 14. Consider Market Changes, Competitive Strategies & Sales Force Sizing When Projecting Sales Headcount**

2 Biggest Sales Force Sizing Mistakes

1) Productivity Enhancement Assumptive Sales Sizing”

- ✚ In Turbulent Economic Times It Is Common To Look At Ways To Justify A Reduction In The Size Of The Outbound Sales Force
- ✚ It Is Common To Hear Organization's Speak Of How Upgrades Or Improvements In IT Programs Or Support Is Going To Increase Productivity By A Double Digit Percentage.
- ✚ Therefore Enabling The Enterprise To Reduce The Size Of The Sales Organization
- ✚ The Reasoning Goes That The Reduction In Size Will Be Made Up- By The Productivity Improvements By The New (Fill In The Blank) Process.
- ✚ Many Times We Have Seen Companies Plan For A Reduction In Headcount Based On A "Productivity Improvement Program"
- ✚ That Hasn't Even Been Finalized And The Reduction In Headcount Is Based On A Projected Improvement That Is Not Supported By Actual Testing Or Scientific Data.

2) "Sales Ratio Sizing"

Another Common Sales Force Sizing Decision That Historically Provides An Adverse Effect Is The Decision To Base The Sizing Of The Sales Force On A Sales / Sales Cost Ratio.

- ✚ The Process Of Using A Sales Cost Ratio To Determine Sales Force Sizing Is A Cost Conservative Approach To Improving Profitable Sales Growth
- ✚ And Only In The Rarest Of Instances Does It Result In Long Term Profitable Sales Growth Performance.
- ✚ In The Vast Majority Of Cases Sales Force Sizing Based On A Sales Cost Ratio Is Associated With Organizations That Have Short Term Perspectives And Histories Of "Spike & Decline" Performance.

Bigger & Better Allocated

On Average, Outbound Sales Organizations That Achieve & Maintain Continuous Profitable Sales & Customer Growth Are:

- ✚ 20% Larger & 50% Better Allocated Than Companies With Historical "Spike & Decline" Sales, Profit & Customer Growth Performance.**

Looking To Increase Profitable Sales & Customer Growth?

Let Us Custom Design A Profitable Hiring / Sizing Solution That Will Meet The Unique Business Needs Of Your Outbound B2B Telephone Sales Organization

**Improving the
Training & Development
Sales Processes
of
Outbound B2B Telephone
Sales Organizations**

**The 5th Component of a Profitable
Sales & Customer Growth Solution Is The
Sales Training & Development Strategy**

As We Move Into The Training & Development Component Of A Profitable Sales & Customer Growth Strategy It Will Become Much Clearer Why We Call Our Solution A Systematic Approach.

Profitable Sales Growth “Requires” A Systematic Approach

You Begin With A Job Description That:

- ✚ Identifies The "Ideal" Sales Candidate**
- ✚ Clearly States The Specific Productivity & Performance Standards Sales Representatives Are Required To Meet.**
- ✚ The Job Description Is Then Reinforced By Only Hiring Sales Candidates That Meet The Ideal Sales Candidate Profile**
- ✚ Pass The Selling Skills Testing, Drug & Background Checks & The Prospecting Exercise.**

Establishing “Compatible Levels” Of Excellence

It Now Becomes Necessary To Improve The Quality Of The New Hire Training Program To Meet The Needs Of A Much Higher Skilled, Driven and Focused Group Of New Hires.

The “Weakest Link” Phenomenon

From A Sales Trainer’s Standpoint, One Of The Most Frustrating Elements Of Training A New Hire Sales Team Is That The Rate Of The Training Can Only Proceed At The Rate At Which The Poorest Quality New Hire Can Learn And Adapt To The Training Program.

The "Hidden Costs" Of Bad Hires

Since Every Minute, of Every Training Module, of a World Class Sales Training Program Can And Should Be Potentially Invaluable To Each New Hire ...

- ✚ A Single Bad Hire Can Cost Your Company Tens or Hundreds of Thousands of Margin Dollars Over The Lifetime Of A New Hire Class.**
- ✚ As The Amount of Critical Selling Skills Effectively Learned By The New Hires With A Much "Higher Potential" For Success...**
- ✚ Is Reduced By The Skills, Motivation & Disruption Level of the Bad Hire(s).**

The Impact of Skills & Motivation On Development

1. Highly Skilled & Motivated – New Hires

For the Highly Skilled and Motivated Candidates, The Pace of the Training Program Moves Too Slow, So They Get Frustrated and Bored and Lose Focus.

2. Moderately Skilled & Motivated – New Hires

Those New Hires With Average Motivation and Skills Will Check Out At Times, But For The Most Part They Just Sit Patiently and Wish the Training Would Move Along a Bit Faster.

3. Poorly Skilled & Motivated – New Hires

For Those New Hires That Have Less Than Average Skills and Motivation The Selling Skills Training Is Moving Too Fast Even When It Is Crawling Along In The Eyes Of The Higher Achievers.

A Waste Of Valuable Time

Invariably It Is The Poorest Quality New Hires That :

✚ Ask the Silly Questions

✚ Talk Too Much

✚ Stop Listening

Wandering Minds – Wasted Money

The Minds Of Poor Quality New Hires Are Often Spent Wandering Trying To Think Up Stories From Their Past They Can Interject Into The Training Discussions To Make Themselves Feel More Comfortable.

Success Limited To The Weakest Link

The Point Here Is That The Quality Of Training Received By A Group Of New Hires Is Limited To The Understanding, Experience, Ability & Desire Of The Weakest Performing New Hire In The Class.

✚ Reducing The Time To Profitability Of All New Hires

Solving The Mystery Of Developing Selling Skills

For Some Mysterious Reason A Sense Of Uncertainty & Doubt Has Embedded Itself Into The Process Of Developing Outbound B2B Telephone Selling Skills And Far Too Many Companies Have Bought Into This Myth.

20 Years Of Vaporware

Just Look At The Number of Sales Books “For Sale” On The Market Today - And You Will See That “Good Marketing Efforts” Have Us Believing We Are No Closer To Understanding & Mastering The Science of Selling Than We Were 20 Years Ago.

There Is No Mystery To Selling

But That Is Nothing But Vaporware As Every Component Of The Tactical & Strategic Selling Processes Can Be Identified, Analyzed & Improved Indefinitely.

Therefore, The Selling Skills of any Outbound B2B Sales Force And The Profitable Sales Growth Produced Any Outbound Sales Organization Can Be Improved Indefinitely.

Improving The Sales Training & Development Processes

- 1. Train Your Sales Managers With Your "New Hire" Training Program As It Is The Sales Manager's Responsibility to Fully Understand Each Component of the Sales Training Program**
- 2. So That When The Sales Managers Assume Responsibility Of The New Hires Development After Graduation From Sales Training, The New Hires Development Continues To Increase Rather Than Decline.**

Sales Managers Can't Teach / What They Don't Know!

And Yet It's Amazing The Number of Sales Managers We Have Met in Companies That Have Never:

- ✚ Been Through Their Organization's Sales Training**
- ✚ Been Assigned To Teach & Role Play New Hires**

Unawareness Leads To Clutter & Confusion

What This Often Leads To Is New Hires Being Trained:

- + One Philosophy Of Selling In Training**
- + And A Different Style By Their Sales Managers**
- + Leading To Clutter, Confusion & Turnover**

The “Forget What You Were Told” Phenomenon

It Is More Common Than You Might Think

For Newly Hired Outbound Sales Representatives:

That Have Just Graduated From Their Organization’s

Formal New Hire Sales Training Program

To Be Instructed By Their Newly Assigned Sales Manager ...

To "Forget" What They Were Just Told In Training...

And To Follow The Sales Manager's Instructions Instead!

**Not A Good Formula When Your Goal Is To Improve
The Profitable Sales & Customer Growth Performance
Of Your Outbound Sales Organization!**

Another Sales Training Tip Testing

Test Each Day Test After Each Module

Require A Minimum Score Of 80% On Each Testing Module

Expect and Accept - Only Excellence

If a New Hire Scores Below the 80% Minimum Standard:

Provide After Hour Labs

Send Candidate Home With Self Studies

**Require That New Hires Pass All Failed Testing Modules
Prior to the Start of Class the Following Day.**

Implement A "No Pass - No Play" Policy

**Have New Hires That Fail Testing Modules
Come In An Hour Early The Following Morning
To Retake Any Modules They Failed The Previous Day.**

Implement Mid-Term & Final Exams

**And Let The Class Know At The Start Of Training
That Their Continued Employment
Is Based On A 90% Score On Both Exams
You'll Be Amazed By The Profitable Results!**

**You'll Also Be Amazed By What You Discover
In This Process About A New Hire's
Commitment and Work Ethic.**

What You See Is What You Get

**The Exact Same Traits That Each New Hire Demonstrates
During New Hire Training Will Be Demonstrated
When They Graduate To The Sales Floor**

**New Hires That Show Up Late For Training
Will Also Show Up Late For Work
When They Graduate To The Sales Floor**

**New Hires That Don't Pay Attention
To The Sales Trainers
Won't Pay Close Attention
To Their Customers Needs Either**

Test For Skills & Character

**Test New Hires
To Measure Their Skills
As Well As Their Character**

**And Eliminate Those New Hires
Found Lacking In Either Category**

Sales Training Analysis & Development

**We'll Conduct An In-Depth Analyze Of
Your Existing Sales Training System**

**And Provide A Solution For Improving
The Performance & Profitability Of Your New Hires**

**During Their Critically Important
First Year of Selling!**

**Improving the
Sales Leads / Account Assignment
Sales Processes
of
Outbound B2B Telephone
Sales Organizations**

Effective Sales Leads

+

Effective Account Assignment

**Improved Prospecting Performance
& Profitable Sales Growth**

Improved Prospecting Performance

**There Is No Other Area In Which We Have Invested More
Time + Money + Resources - Than In Developing Processes To
Improve An Outbound Sales Organization's Ability To:**

+ More Effectively Prospect For New Business

The "Silver Bullet"

If Ever There Was A “Silver Bullet” For Improving The Performance & Profitability of an Outbound B2B Telephone Sales Organization:

- + Developing & Implementing An Effective Business Intelligence System Would Be It!**

Automated - Business Intelligence Systems

Organizations That Effectively Develop Automated Processes To Send “Real Time” Business Intelligence Directly To The Desktop Of Their Outbound Sales Representatives Have Show:

- + Significant Increases In Their Customer Acquisition Performance**

Why Invest In Business Intelligence?

All The “Valid Business Reasons” Your Outbound Sales Organization Will Ever Need To Contact Their Top Prospects & Customers As Often As They Need Are:

- + Available Today – Free - On The Internet**

What Is Business Intelligence?

Business Intelligence Is Knowledge That Can Be Converted Into Valid Business Reasons To Contact Target Prospects / Customers

Examples Of Business Intelligence:

- + Pain & Problems**
- + Financial Releases**
- + Strategic Initiatives**
- + Mergers & Acquisitions**

- ✚ **Building Of New Facilities**
- ✚ **Changes At C-Level Positions**
- ✚ **Store & Plant - Openings & Closures**
- ✚ **Complete “Key Contact” Information**

“Setting Up” A Business Intelligence System

To Set-Up An Effective Business Intelligence System

You Will Need To Know The Following:

- ✚ **The Right Questions To Ask**
- ✚ **How To Properly Word Each Question**
- ✚ **Where To Obtain The Most Effective Answers**
- ✚ **How To Design Business Intelligence Filters**
- ✚ **How To Automate The Data Capture Process**
- ✚ **How To Get The Business Intelligence Automatically
Delivered To The Appropriate Account Manager’s Desktop**

Targeted Industry - Business Intelligence

**In The Retail Industry, For Under \$600 There Is A Targeted
“Retail” Business Intelligence Resource That Provides The
Following “Extremely” Important & Accurate Information:**

- ✚ **Annual Sales**
- ✚ **Current # Of Stores**
- ✚ **Number of Employees**
- ✚ **Key Contacts & Titles**
- ✚ **Location Of Each Store**
- ✚ **Projected Store Closures**
- ✚ **# Of Lanes In Each Store**
- ✚ **Projected Store Openings**

- ✚ Technology Budget Details**
- ✚ Type Of Computing Technology**
- ✚ Plans For Improving Technology**

Supply Chain - Business Intelligence

You Can Obtain Automated Daily Intelligence Reports Notifying Your Sales Organization Of Your Target Prospect's & Top Customer's Plans For:

- ✚ Acquisitions**
- ✚ Expansions***
- ✚ Plant Closures**
- ✚ New Facility Openings***
- ✚ Project Leaders**

Including:

- 1) The size and location of each facility**
- 2) When each facility will be constructed**
- 3) When the facility is projected to be opened**

Develop An Automated Business Intelligence System Within Your Organization

Which Will Provide Your Outbound B2B Telephone Sales Teams With Unlimited "Value Packed" & "Value Added" Reasons To Contact Your Target Prospects & Customers

&

**You'll Significantly Increase The Profitable Sales &
Customer Growth Performance Of Your Outbound B2B
Telephone Sales Organization.**

Attracting & Retaining New Customers

Sales Growth Strategies That Continuously & Profitability

Attract & Retain New Customers Consists of These Processes:

- + Developing A Business Intelligence System**
- + Creating Account Penetration Maps**
- + Identifying Valid Business Opportunities**
- + Creating Targeted Sales Approaches**
- + Executing Triangulation Prospecting Strategy**

Account Penetration Maps

**Outbound Excellence's Patented Process For Creating Account
Penetration Maps Consists Of These Steps:**

- + Step #1 - Identifying Secondary Facilities**
- + Step #2 - Identifying Key Contacts @ Secondary Sites**
- + Step #3 - Transferring Key Data Into An Account Map**

Identifying Valid Business Opportunities

**Account Penetration Map Are Developed For "Key" Target
Prospect Accounts & Completed Prior To Making An Initial
Contact To The Primary Site. This Process Includes:**

- + Step #1 - Contacting Secondary Locations**
- + Step #2 - Identify Pain / Problems / Opportunities**
- + Step #3 - Presenting Potential Solutions**

- + Step #4 - Verifying Key Decision Makers**
- + Step #5 - Understanding Decision Making Process**
- + Step #6 - Determining Key Budget Information**

Creating Targeted Sales Approaches

Sales Support Groups Can Then Review The Account Maps To Get A Quick & Accurate Understanding Of The Target Account & Potential Opportunity & Then Leverage Their Combined Expertise To “Create Targeted Sales Approaches”

“Targeted Sales Approach” Processes

There Are A Number Of Ways That Marketing & product management Can Leverage Their Knowledge, Skills & Abilities To Help Develop Effective Targeted Sales Approaches:

- + Step 1: Identifying How Your Company's Solutions Have Already Helped Companies In The Same Industry Facing This Same Challenge Effectively Overcome The Challenge**
- + Step 2: Identifying Established Relationships Within Secondary Sites Affiliated With The Target Account**
- + Step 3: Obtaining Reference Letters & Authorization To Use A Current Buying Contact As A Reference**

Executing Triangulation Prospecting Strategy

Here Are Some Of The Reasons Why Our Triangulation Prospecting Sales Process Helps Make Our Customer Acquisition Strategy Both “Highly Effective” & “Highly “Profitable:”

✚ Reason #1: Reduces Wasted Time & Effort

By Eliminating Contacts To Key Decision Makers:

- ❖ With Nothing More Than An Introduction & Offer To Send Information**
- ❖ That May Or May Not Have Any Relevance To The Key Decision Makers Needs**

✚ Reason #2: Increases Customer Contact Time

Instead Of Sending Endless Voicemail Messages Inquiring:

- ❖ "Did You Receive The Literature"**
- ❖ Which The Prospect Never Read**

Key Decisions Makers Have Time Allocated On Their Schedule To Review Your Solution As You Have Earned Both Their Trust & Interest

✚ Reason #3: Leverages Affiliated Buying Accounts

It Is Common For Multiple Reps To Work Multiple Subsidiaries Of The Same Parent Company While Neither Rep Is Aware Of The Other's Affiliation.

Here Are A Number Of Ways To Leverage Affiliated Buying Accounts:

- ✓ Inter-Company Referrals**
- ✓ Approved Vendor Status**
- ✓ Established Credit Lines**
- ✓ Volume Purchasing Discounts**
- ✓ Understanding Of Corporate Business Needs**

Reason #4: Increases Sales, Profits & Customer Growth

It Is The Ability Of Organization's To Teach Their Outbound Account Manager's How To Consciously, Genuinely & Purposefully Establish Credibility & Trust With Prospects That Is The Key To Winning Large Target Account Opportunities.

Our Triangulation Prospecting System Improves Outbound Sales Organization's Ability To Win Larger & More Profitable Target Opportunities By Teaching Them How To:

- ✓ Execute More Effective Prospecting Calls Pre-Designed To Offer A Complex Solution To One Of Each Target Company's Most Pressing Needs**
- ✓ Earn The Right For Prospects & Customers To Open Up And Discuss The Challenges They Face In Increasing Their Sales / Reducing Their Costs**
- ✓ Prepare To Match The Specific Value The Customer Would Receive From Your Solutions To Their Stated Needs And Challenges**

Resulting In The Achievement Of Continuous Profitable Sales & Customer Growth Performance.

Quarterly Account Development Updates

Another Profitable Customer Retention & Development Process Is Conducting Quarterly Account Development Research To Identify Potential New Business Opportunities Such As:

- ✚ Risk Factors**
- ✚ New Facility Openings**

- + Competitive Movement**
- + Mergers & Acquisitions**
- + New Strategic Initiatives**
- + Target Facility Expansion**
- + Changing Industry Trends**

Become The Source For Key Industry News

Key Decision Makers & Influencers Are Spending Considerable More Time Searching The Internet To Obtain Key Industry Intelligence ...

Convert Their Search Engine Efforts To An Automatic Feed From The Knowledge Center Section Of Your Website To Their E-Mail "Inbox." Also:

- ❖ Create Technology Specific "User Groups"**
- ❖ Develop "Target Industry" Newsletters**
- ❖ Add A "Latest Industry News" Landing Page**
- ❖ Conduct "Changing Industry Trends" Webinars**

Develop Targeted Solutions Specifically Tailored To Overcome Common Industry Challenges

Developing Target Customer Solutions

Here Are 5 Ideas For Developing Profitable Target Solutions That Meet Your Target Industries Most Pressing Needs:

I. Develop Target Industry Newsletters

- ✚ Have Each Newsletter Address A Key Target Industry Challenge**
- ✚ Include Tips & Ideas For Overcoming Each Challenge**
- ✚ Include A Case Study Of How Your Company's Solutions Have Already Helped A Company In That Same Industry Effectively Solve The Problem Addressed In The Newsletter**
- ✚ Also Include A Case Study Of A Solution You Provided That Solved A Customer's Problem By Either Cutting Costs Or Creating A New Revenue Stream**

II. Hold Target Industry Events & Webinars

- Invite Your Prospects & Customers To:**
 - Attend Regular Industry Events & Webinars**
 - Ask Them To Invite Their Staff, Peers & Superiors**
- Have Your Sales Team Call The Attendees To:**
 - Identify Specific Topics & Challenges The Attendees Would Like To Discuss At The Event**
- Chart The Attendee's Feedback:**
 - With A Pareto Chart**
 - Mirror The Agenda To Match The Chart**
- Provide “High Impact” Information**

- **Don't Treat These As Marketing Events**
 - **Use These Events To Establish Credibility & Trust**
 - **Focus Solely On Listening To Your Customer's Needs & Then Showing Genuine Concern And Competence**
- **All The Questions You Need Answered:**
- **To Improve Your Current Offerings**
 - **To Effectively & Profitably Develop Your Next Generation Of Solutions**
 - **Provided By Highly Targeted Prospects & Customers**
 - **If You'll Improve Your Company's Focus On Providing Increasingly Higher Levels Of Value To Your Target Prospects And Customers**
-

Don't Generate Sales Leads Build A Leads Factory Instead!

7 Steps To Building A Profitable Leads Factory

- 1) **Hire A Lead Generator**
 - **That Fits Your Ideal Sales Candidate Profile**
 - **Use This Position As A Step To An Outbound B2B Telephone Sales Representative Position**

2) Have The Leads Generator

- **Pull Lists Of Industry Specific Target Prospects**
- **Use The Ideal Customer Profile Criteria**

3) Obtain Accurate Contact Information *Now Readily Available

- **Full Name**
- **Title**
- **Phone #**
- **E-Mail**

4) Set-Up An Automated Lead System

- **Lead Request Process**
- **Lead Distribution Process**
- **Lead Tracking Process**
- **Lead Reporting Process**

5) Task Your Sales Managers To Ensure All Sales

Representatives Are:

- **Requesting Sales Leads**
- **Receiving Sales Leads**
- **Contacting New Sales Leads**
- **Closing More sales Leads**

These Are Just A Few Of Our
“Sales Lead” Processes

That Have Proven Effective In Increasing Profitable Sales & Customer Growth Performance

Account Assignment Strategy

Outbound Sales Organizations That Assign Their Salespeople To Targeted Market / Customer Segments Achieve Significantly Higher Profitable Sales & Customer Growth Performance

Than Outbound Sales Organizations That Use An Alternate Account Assignment Approach

A Profitable Account Assignment Strategy

A Profitable Account Assignment Strategy Includes The Following Processes:

Analyzing

- ✓ **Active Buying Customers To Identify Segmentation & Assign Prioritization Of Target Markets**

Assessing

- ✓ **Target Market Segments To Ensure The Unique Needs Of Each Market Segment Are Well Defined**

Developing

- ✓ **Customized Selling Strategies Tailored To Meet The Unique Business Needs Of Each Target Market Segment**

Ensuring

- ✓ **Appropriate Sales Force Size, Structure & Assignments Are In Place Maximizing Sales Force Investment Across Product & Customer Segments & Maximizing The Sales Organization's Ability To Capture New Market Share Across All Target Customer Segments.**
-

Looking For Ways To Increase Profitable Sales Growth?

**Let Us Custom Design A Profitable
Sales Leads / Account Assignment Solution**

**That Will Meet The
Unique Business Needs Of Your
Outbound B2B Telephone
Sales Organization**

Improving the Performance Goals Processes of Outbound B2B Telephone Sales Growth Strategies

Performance Goals & Action Plans

Performance Goals & Action Plans Are the Map & Compass of the Sales Organization.



Therefore, In Order For An Organization To Achieve & Maintain Continuous Profitable Sales & Customer Growth Performance, The Organization Must Possess The Ability To Achieve & Maintain Increasingly Higher Levels Of Productivity, Performance and Profitability Goals.



Benefits Of Effective Performance Goals

Organizations That Have Proven Systems To Effectively Set And Monitor Accurate Performance Goals:

- 1. Are 97% More Successful Than Organization's Without Effective Performance Goal Systems**

- 2. Performance Goals Are Incredibly Motivating Because Their Achievement Indicates Security, Recognition & Success**
- 3. Goals Establish How Salespeople Focus Their Time, Energy & Resources**
- 4. Performance Goals Play A Vital Role In The Success Of The Performance Monitoring & Compensation / Incentive Strategies**
- 5. The Average Sales Organization Could Improve The Effectiveness Of Their Goal Setting Strategy By 40%**

8 Most Common Goal Setting Mistakes

1. Sales Goals Are Developed

- + In A Top Down Process**

2. Sales Goals Are Based:

- + On Emotion Rather Than Facts**

3. Sales Goals Are Made:

- + Without The Proper Input & Buy In From The Salespeople That Will Be Responsible For Achieving Them**

4. Rewards Are Not Properly Aligned:

- + With The Achievement Of Sales Goals**

5. The Sales Organization's Goal Setting Process:

- + Are Not Properly Aligned With The Enterprise's Sr. Leadership Goal Setting Process**

6. Salespeople Don't Understand How The Achievement Of Their Individual Goals:

- + Contributes To The Achievement Of The Sales Organization's Goals**

7. Lacking Proper Goal Alignment The Energy Of The Sales & Sales Support Organizations:

- + Are Not Focused On Improving The Things That Matter Most ...**
- + Providing Increasing Value To The Customer**

8. Poor Goal Setting Leads To Continuous Re-Forecasting Which:

- + Erodes Credibility**
- + Increases Turnover**

Achieving Organizational Excellence

Without Accurate & Achievable Performance Goals, Members Of Your Sales Organization Will Waste Valuable Time, Effort & Resources Inefficiently Pursuing Activities That Contribute Very Little To Organizational Excellence!

The "Shotgun" Approach

However, In Well Over 70% Of The Sales Organizations We Analyze We See A Lack Of Shared Goals Amongst The Salespeople & The Overall Sales Organization

In A Typical Outbound Sales Organization

Are Individuals & Groups Of Individuals:

- + Striking Out In Different Directions**

- ✚ **Focusing On Their Own Individual Goals**
- ✚ **Little Collaboration Amongst Sales Teams**
- ✚ **Little Collaboration Amongst The Overall Sales Organization**

15 Performance Goal Requirements

Properly Aligned	Clearly Defined
Accurate	Measurable
Written	Active Involvement
Mutual Agreement	Properly Perceived
Established Timelines	Properly Monitored
Regularly Reviewed	Adequately Supported
Often Celebrated	Rightly Rewarded
Relentlessly Pursued	Relentlessly Pursued

Goals Must Be Properly Aligned

- ✚ **The Achievement Of Each Individual Sales Goal Must Contribute To The Achievement Of A Key Sales Organization Goal**
- ✚ **The Achievement Of Each Sales Organization Goal Must Contribute To The Achievement Of A Key Corporate Goal**

Goals Must Be Clearly Defined

Be Very “Specific” About:

+ What Successful Achievement Will Look Like

+ How Performance Will Be Measured

Performance Goals “Must” Be Accurate

If Performance Goals Are Too Low:

+ You Won’t Maximize Sales Force Efforts

If Performance Goals Are Too High:

+ Your Sales Organization Will

- **Become Frustrated**
- **Lose Focus**
- **Actually Underachieve**

Performance Goals Must Be Measurable

- **Every Performance Goal Must Be Measurable**
- **An Effective Performance Monitoring System Must Be In Place To Accurately Monitor Performance**

Employee Involvement Maximizes Goal Achievement

Obtaining Employee Input When Setting Performance Goals

+ Shows Employees That Their Contributions Are Recognized & Valued

+ Maximizes The Probability Of Goal Achievement

+ Involvement In The Goal Setting Process Instills An Added Sense Of Responsibility For Achieving Each Goal

Obtain Mutual Agreement

Dictated Performance Goals

- ✚ **Don't Inspire The Motivation & Effort Required
To Achieve High Performance Goals**

Obtain Agreement On Performance Goals

- ✚ **So Both Parties Are Committed To Their Achievement**

Perceiving Is Believing

Ensure That Each Member Of The Sales Organization

Perceives Their Goals As:

- ✚ **Challenging**
- ✚ **Realistic**
- ✚ **Achievable**
- ✚ **Important**

Establish Timelines

Assign Specific Timelines For Each:

- ✚ **Sales Goal**
- ✚ **Step Of The Action Plan**

Develop A Follow-Up System

To Monitor Performance & Modify Action Plans When Necessary

Obtain Feedback & Agreement

On How Each Salesperson Is Performing Against Their Goals

After Each Follow-Up Session

Document The Action Steps Each Party Agreed To Execute

Provide On-Going Support

In Addition To Follow-Up Sessions:

- ❖ **Make It A Habit To Ask Each Salesperson
How You Can Help Them Achieve Their Goals**
- ❖ **And Then Take An Active Role In Helping Them**

Celebrate “Small Wins”

**Acknowledge The Small Wins Your Salespeople Achieve In Route
To Achieving Their Performance Goals. Acknowledgement:**

- ✚ **Fuels The Fire Of Motivation**
- ✚ **Leads To Greater Levels Of Achievement**

Develop An Effective Incentive Plan

**That Will Ensure Each Member Of The Sales Organization Will
Be Sufficiently Motivated To:**

- ✚ **Overcome The Many Challenges And Frustrations
That Meaningful Goal Achievement Requires**

Why Performance Goals Are Not Achieved

**The #1 Reason Salespeople Give For Not Achieving Their
Assigned Sales Goals Is That They Perceive:**

- ✚ **They Don't Have The Available Time
To Execute The Assigned Action Steps**

Creating Time For Achieving Goals

**If Your Salespeople Perceive They Can't Find Time
To Effectively Achieve Their Assigned Performance Goals:**

- + Pick A Random Day & Spend 4 Hours Observing Your
Sales Force During Their Peak Call Periods**
- + What You'll Discover Is That The Average Salesperson
Spends 60% of their "Peak" Call Time:
 - Unfocused
 - Inefficient
 - Executing "Non-Calling" Activities**

Converting Time Into Money

**Interested In Increasing The Profitable Sales Growth
Of Your Outbound B2B Telephone Sales Organization?**

- + Schedule Daily "Call Blitz" Sessions**
- + Then Lead Your Salespeople To Effectively
Execute Their Daily Call Blitz Strategies**
- + You'll Free Up 1 to 2 Hours A Day For Executing Action
Plans & Achieving High Performance Goals**



Outbound Excellence Can Help Improve Your Performance Goals Strategy

By Answering The Following Key Performance Goal Questions:

- 1. What Sales Goals Are Most Important?**
- 2. What Are The Benchmarks For These Goals?**
- 3. What Are The Best Processes & Formats For Measuring These Goals?**
- 4. What Are The Key Mistakes I Should Avoid In Structuring Performance Goals?**
- 5. What Are Some Of The Most Effective Ways For Aligning Goals Throughout The Organization?**
- 6. What Are The Best Ways To Establish Effective “Action Plans” To Ensure Goals Are Attained?**
- 7. How Do I Get Buy In From The Sales Team?**
- 8. How Can I Ensure That The Sales Team Has The Adequate Knowledge, Skills & Resources To Effectively Execute Their Action Plans?**
- 9. How Do I Motivate The Sales Team To Keep Focused On Executing Their Action Plans Until Their Performance Goals Are Achieved?**
- 10. How Do I Follow Up To Ensure Adequate Progress Is Being Made Toward Each Goal To Ensure The Required Results Will Be Obtained Within The Designated Time Frame?**



Improving the Selling Skills Processes of Outbound B2B Telephone Sales Growth Strategies

Selling Skills Strategy

**An Effectively Designed & Implemented Selling Skills
Strategy Improves:**

- + Tactical Selling Skills**
- + Strategic Selling Skills**
- + Account Acquisition Skills**
- + Account Retention Skills**
- + Account Development Skills**

Listen To Your Salespeople!

**The Most Profitable Tip You Could Receive About
Increasing The “Selling Skills” As Well As The Profitable
Sales & Customer Growth Of Your Outbound Sales
Organization Is ... "To Listen"**

If You Were The Prospect ... Would You Buy?

Listen To Your Salespeople Selling Over The Phone To Your Target Prospects & Customers And Then Ask Yourself ...

- ✚ If You Were The Prospect On The Other End**
- ✚ Would You Trust The Sales Representative You Are Listening To...**
- ✚ To Provide A Complex Solution To One Of Your Company's Most Pressing Needs...**
- ✚ Based On The Questions They Asked...**
- ✚ And The Information They Conveyed**

Listen For Rattling ...

Listen To Whether Your Salespeople Are Rattling Off Lists Of Features & Benefits:

- That May Not Have Any Relevance To Your Prospect's Wants & Needs**
- Or Whether They're Asking Well Planned & Thoughtful Questions To Uncover Areas of Pain & Potential Opportunities**

Listen For Value...

Listen To Whether Your Salespeople Are Demonstrating To Your Prospects & Customers:

- ✚ How They Can Help Improve Your Prospect's & Customer's Business Operations**

- ✚ **And “Enhance The Value” That Your Customers Provide To “Their” Customers**

Listen For Understanding

Listen To Whether Your Salespeople Are Demonstrating:

- ✚ **If They Understand Each Customer’s Unique Situation**
- ✚ **By Matching The Specific Value Received From Your Solutions To Each Customer’s Unique Needs**
- ✚ **And In The Process Increasing Your Value Proposition With Your Target Prospects & Customers**

People Love To Hear Stories

Stories Replace The Mechanical Relationship Most Companies Have With Their Customers Today

- ✚ **With An Intelligent & Thoughtful "Human Interaction"**

Provide Your Salespeople With Stories

With Compelling "Real Life" Situations Your Company Has Experienced In Helping Customers Meet Unique & Interesting Challenges!

Listen For Emotion

Emotion Sells ... Reasoning Rationalizes

- ✚ **Emotions Play A Critical Role In the Selling Process**
- ✚ **& Aligning With Customer Needs Using Compelling Stories**

- ✚ **Is One Of The Most Effective Ways To Stir....
Customer Emotion!**

Listen To Your Customers

**Listen To Your Sales Team Calling Your Prospects & Customers
And In Doing So You'll Be Listening To The Thoughts, Ideas &
Concerns:**

- ✚ **That Lead Profitable Enterprises To Develop
New & Improved Customer Solutions**
- ✚ **That Meet Future Customer & Industry Needs
With Leading Edge Solutions**
- ✚ **At High Margin & With Minimal Risk**

As You Listen To Your Customers ...

**You'll Hear All The Answers, To All The Same Questions
Being Asked In Marketing & Product Development Meetings**

- ✚ **And You Can Hear Your Customers Answer These
Questions Every Day On The Telephone....**
- ✚ **If You'll Just Take The Time.... To LISTEN!!!!**

**Commonly Answered Questions
By
Target Prospects & Customers**

Customer Acquisition Questions

- ✚ Why Didn't Our Marketing Program Work?
- ✚ Why Didn't We Get The Return We Expected?
- ✚ What Do We Try Next?
- ✚ Are Our Prices Competitive?
- ✚ How Do We Drive More Sales To Our Website?
- ✚ Are Our Salespeople Asking For Referrals?

Customer Retention Questions

- ✚ How Do Our Customers Feel About Our Offerings?
- ✚ Why Are We Losing Customers?
- ✚ What Can We Do To Retain The Customers We Have?
- ✚ How Do We Increase Our Value To Our Customers?
- ✚ What Do Customers Like About Our Competitors?
- ✚ What Frustrates Customers Most About Us?
- ✚ What Would Customers Like For Us To Do Better?
- ✚ What New Challenges Are Our Customers Facing?

Customer Development Questions

- ✚ Are We Probing For New Customer Problems?
- ✚ What New Problems Could We Profitably Solve?
- ✚ Are We Aware Of Our Customer's Subsidiaries?
- ✚ Are We Aware Of All Key Decision Makers?
- ✚ Do We Know Our Customer's Decision Making Processes?

**✚ You Can Learn A Lot Of Profitable Information By
Reviewing Your Salespeople's Pre-Call Planning Strategy**

Profitable Sales Growth Lies in Pre-Call Planning

- 1. You Don't Find Marginally Profitable Companies
Executing Exceptional Pre-Call Planning Strategies**
- 2. You Find Marginally Profitable Companies Executing
Marginal Pre-Call Planning Strategies**
- 3. You Find Highly Profitable Companies Executing
Exceptional Pre-Call Planning Strategies**
- 4. And You Find Unprofitable Organizations Having
No Pre-Call Planning Strategies At All!**

Leverage Business Intelligence

**Business Intelligence Is “The Key” To An Effective
Pre-Call Planning Strategy.**

- ✚ With the Business Intelligence Available Today
There's No Reason An Outbound Sales Representative
Should Call A Target Prospect or Customer Account
Without A Valid Business Reason Targeting A Specific
Customer Need!**



Analyzing A “Pre-Call” Planning Strategy

**Here Are A Number Of Key Questions To Ask Your Salespeople
In Order To Determine The Quality Of Their Pre-Call Planning:**

Cold Call Questions

- ✓ **Is This A Target Prospect Account?**
- ✓ **What Do you Know About The Account?**
- ✓ **Is The Profile Accurate In Our CRM Database?**
- ✓ **Who Is Your Target Contact?**
- ✓ **How Did You Identify The Contact?**

What Do You Know About The Contact?

- ✓ **What Is Your Purpose For Calling Today?**
- ✓ **What Information Are You Pursuing?**
- ✓ **What Will You Do With The Information?**
- ✓ **Do You Have This Information Documented?**

Pending Opportunity Questions

- ✓ **Who Are The Decision Makers Involved?**
- ✓ **What Are Their Titles?**
- ✓ **What Are Their Roles In This Opportunity?**
- ✓ **Is This Opportunity Budgeted?**
- ✓ **Was The Opportunity Put Out To Bid?**
- ✓ **Did They Send Out An RFQ or RFP?**
- ✓ **Who Are The Competitors?**
- ✓ **What Is The Customer's Main Need?**
- ✓ **What Solution Are You Proposing?**
- ✓ **Why Did You Select This Solution?**
- ✓ **What Are The Competitors Proposing?**
- ✓ **When Is The Bid Due?**
- ✓ **When Will A Decision Be Made?**
- ✓ **How Will We Be Notified?**

Active Customer Questions

- ✓ **What Products & Services Are They Using?**
- ✓ **Where Are They Using Them?**
- ✓ **What Are They Using Them For?**
- ✓ **How Happy Are They With Our Products?**
- ✓ **What Don't They Like About Our Products?**
- ✓ **How Do They Feel About Our Support?**
- ✓ **Who Are Our Competitors?**
- ✓ **Why Did They Choose Us Over Them?**
- ✓ **Is This The Parent Company?**
- ✓ **Are There Other Affiliated Companies?**
- ✓ **Are The Affiliated Companies In Our DB?**
- ✓ **Are Any Of The Affiliated Accounts Active?**
- ✓ **Has Each Affiliated Account Been Contacted?**
- ✓ **When Did You Last Ask For A Referral?**
- ✓ **Is Your Referral Request Documented?**

Listening & Note Taking Skills

Are Your Salespeople Listening To Your Customers?

- ✚ **Observe The Notes Each Sales Person Is Taking
While Your Prospects & Customers Are Talking**
- ✚ **It's Hard To Meet A Need
That's Not Effectively Defined!**

Skill & Commitment

As You Observe Your Salespeople ... Ask Yourself!



**Are Your Salespeople Skilled & Committed Enough
To Connect With Your Target Prospects
& Customers Long Enough**



**To Earn The Right For Your Prospects & Customers
To Open Up & Discuss
The Challenges They Are Facing**



**In Increasing “Their” Sales &
Reducing “Their” Costs
And How Your Company's Solutions
Could Help Them In These Problem Areas**



Developing & Maintaining - Improved Selling Skills


- I. Focus On Key Areas Of Customer Interest That You Can Provide Which Your Competitors Can't or Won't Deliver.**
- II. Use Testimonials, Case Studies & Referrals To Demonstrate How Effective Your Company Is At Solving The Problem For Which You Are Proposing A Solution.**
- III. Focus Solely On Benefits That Are Targeted To Meet The Immediate Customer Needs For Which You Are Proposing Your Solution.**
- IV. Produce A Sense Of Urgency For The Prospect To Buy Now To Maximize Their Return On Investment.**
- V. When The Prospect Is In Agreement Of The Many Ways Your Solution Will Benefit Them Ask For The Sale!**




**Looking For Ways To Increase
Profitable Sales & Customer Growth**



**Let Us Custom Design
A Profitable Selling Skills Solution**



**That Will Meet The Unique Business Needs
Of Your Outbound B2B Telephone
Sales Organization**



**Improving the
Account Management / Account
Development – Sales Processes
of
Outbound B2B Telephone
Sales Growth Strategies**

An Effective Account Management / Account Development Strategy:

1) Improves

The Sales Organization's Ability To Increase The Profitable Sales Growth Of Their Active Buying Accounts

2) Establishes

Sales Development Initiatives For Each Account Manager Based On Their Performance & Individual Development Needs

3) Provides

A Follow-Up System To Ensure That Increasingly Higher Levels Of Account Management & Account Development Skills Are Being Achieved and Maintained.

The Costs of “Not” Meeting Customer's Needs

Unhappy Customers

For Every Unhappy Customer That Complains

✚ 26 Remain Silent!

Wronged Customers

The Average “Wronged” Customer “Will Tell”

✚ 12 Other People!

Unmet Customer Needs

Fail To Understand & Meet The Needs Of The Average Customer And

✚ 91% Will Stop Doing Business With You

Remedy Customer Complaints

Solve Customer Satisfaction Issues Promptly And

🚦 81% Will Continue to Make Purchases

Don't Accept Excuses

For Poor Customer Satisfaction Performance

Excuses Are Made For One Reason....

To Justify Poor Performance!

Uncover The Root Causes

Of Weak Customer Development Performance

& Repair or Replace As Necessary

Stop Assuming You Understand

Your Customer's Challenges

Don't Allow Your Organization

To Assume It has A Clear Understanding:

1. Of The Challenges & Difficulties
Facing Your Customers
2. How These Challenges Could Change
The Way They Do Business



Ask More Questions of Your Customers

- 1. What Are Their Key Business Goals?**
- 2. How Do They Perceive Your Company**
- 3. Can Help Achieve These Goals?**
- 4. What Are Their Biggest Challenges?**
- 5. What Could Your Company Do To Help Overcome These Challenges?**

Research & Share Key Industry Trends & Ideas

Insight & Guidance Provided To Your Customers ...

Is What Puts Your Value Above Your Competitors!

It's Common For Prospects To Convert To Buyers

As A Result Of Receiving An Article That Relates To The Prospect's Business

And Has Nothing To Do With The Provider's Solutions!

Increase Your Level Of Personal Customer Contact

Profitable Business Relationships Are Built & Developed By Human Contact, So Call Your Customers & Ask:

- ❖ If They Are Happy Doing Business With You**
- ❖ What They Like Most About Doing Business With You**
- ❖ What They Would Like To See You Do Better**

People Know The Truth When They Hear It!

**Call Your Customers With No Intention of Mentioning
Your Products & Services**

- **But Just To Share Your Genuine Appreciation
For Their Business**

Identify Your Unique Value Offering

**Separate The Value Of Your Organization's Offering
From Your Competitors:**

- **Find Ways To Do Things That Your Customers Need That
Your Competitors Are Unable Or Unwilling To Provide**
- **Identify These Areas & Translate Them Into A Competitive
Value Matrix**
- **This Will Clearly Demonstrate & Differentiate The Unique
& Added Value Of Your Solutions**
- **And Allow Prospects To Make A More Educated Decision**

Relentlessly Pursue – Customer Excellence!

**Make Sure Your Company Puts The Same Time, Effort &
Resources Into Developing Existing Customers:**

- ❖ **As They Invest Into Acquiring New Customers**

Be Creative In Improving Your Value Proposition

**Research & Monitor Your Competitor's Best Practices
& Product / Service Offerings:**

- ✚ **Integrate Competitive Ideas That Will Increase
The Value Of Your Offering (E.G. Landing Pages)**

Increase Your Value W/ Automated “Industry Expertise”

**Set-Up Automated RSS Feeds That Constantly Monitor &
Retrieve Target Industry News Releases That Could Benefit
Your Customer’s Business**

- ✚ **Be The First To Share This Information With
Your Customers (e.g. website, newsletter, targeted
calls)**

Developing Effective E-Newsletters

**Here’s How To Develop Target Industry Newsletters That Will
Distinguish Your Value Offering From Your Competitors:**

- **Make Them Industry Specific**
- **Focus On What's New In Each Industry**
- **Include Competitive Customer Info**
- **Include What's New With You**
- **Include A Case Study**
- **Describing How You Have Already Helped**
- **Customers In The Same Industry Overcome**
- **The Challenge Highlighted In The Newsletter**

Benefits Of Industry Targeted E-Newsletters Include:

- ❖ **Being The Knowledge Source For Customers**
- ❖ **Increasing Customer Contact**

- ❖ **Improving Your Perceived Value**
- ❖ **Driving Prospects To Your Website**
- ❖ **Keeping Your Customers Coming Back**

**Here Are A # Of Other “Proven Ways”
For Retaining & Developing Your
Active Buying Customers**

Analyze Your Top 100 Customer's Buying History

- 1. What Products Have They Purchased?**
- 2. What Complementary Products Do You Offer?**
- 3. Have You Presented The Complementary Products?**
- 4. Are They Purchasing Services As Well?**
- 5. What Products That They Have Purchased In The Past,
Are They No Longer Purchasing? Why?**
- 6. How Have Their Buying Trends Changed?**
- 7. Are They Purchasing In Greater Volume?**
- 8. Are They Purchasing With More Frequency? Why?**
- 9. Are Orders Being Shipped To Multiple Facilities?**
- 10. Are There Target Locations You Are Unaware Of?**
- 11. Are All Facilities Ordering The Same SKUs?**
- 12. If Not, What's The Reason?**

Active Customer – Buying Trend Analysis

One Of Our Most Popular & Effective Account Management / Account Development Processes Is Our Buying Trend Analysis

✚ Our We Begin By Charting The Buying Trends Of Your Top 100 Active Buying Accounts.

- 1. Identify Changes In Active Customer's Regular Buying Pattern**
- 2. Monitor Customers w/ Increasing & Decreasing Buying Trends**
- 3. Map Out Products & Services Would Complement The Current Products & Services Being Purchased By Each Account**
- 4. Increase Your Sales, Profits & Customer Growth Performance**

Involve Your Customer's In Development Projects

Take 50% Of The Time Your Marketing and Development Teams Spend Sharing Their Beliefs About What Customers Like & Dislike About Your Solutions And Have “Them Contact” 20 Of Your Top Customers & “Ask Your Customers”

- I. What Really Drives Them To Buy?**
- II. What New Products & Services Are They Looking To Buy In The Next 12-18 Months?**
- III. Ask For Their Input On Your Ideas For Developing New Products and Services**
- IV. Invite Them To Test Your New Product Releases To Discover Ways To Make Them Even Better.**

Active Customer Involvement

In Your Development Processes Not Only Makes Customers Feel Important It Reinforces Their Buying Decision!

The Million Dollar Question

Every Organization Should Personally Ask Every One Of Their Top 100 Active Customers The \$1 Million Question:

- ✚ If You Could Name One New Product or Service We Could Offer You That Could Help Your Business
What Would It Be?**

Reward NEW Ideas!

Reward Your Salespeople & Customers For The New Business Development Ideas They Provide.

Offer Salespeople Incentives for “Repeat Buyers”

The Companies Most Likely To Buy From You Are Customers That Have Bought In The Past.

- ✚ Run "Repeat Buyer" Contests**
- ✚ Provide Incentives For Salespeople To Make Sales To Inactive Customers**
- ✚ Add A Double Incentive For The Sale Of New Products & Services To Active Buying Accounts**

This Is A Well Proven Process For Growing Sales, Increasing Profits And Developing More Customers! Not a Bad ROI!

Offer Your Customer's A "Test Drive"

Invite Customers To Test Proposed Product Or Service Ideas:

✚ Not Only Will Your Customers

**Provide Great Ideas For Improving Your
Products & Services**

✚ They'll Eliminate The Nagging Question

**“Why Aren't We Getting More Sales
From Our “New” (fill in the blank) Program”**

Create Customer Loyalty Programs

**Create Effective Programs That Provide Customers
with Valuable Incentives Based On Their:**

✚ Buying Volume

✚ Frequency

✚ Longevity

Popular Customer Incentives

**Customer Loyalty Programs Create Powerful Forces
That Keep Customers Buying! Popular Incentives:**

✓ Additional Discounts

✓ New Services

✓ Improved Service Levels

Developing Profitable Account Management / **Account Development Solutions**

1. Educate Salespeople On The Importance Of Learning:

+ More About Their Prospects & Customers

**2. Develop A User Friendly System For Your Sales
Representatives To:**

+ Capture Key Customer Information

3. Provide Incentive For Your Sales Representatives To Capture:

**+ Key Industry News Releases That Continually Increase
The Value Of Your Customer Offerings**

**4. Develop A Performance Monitoring System That Accurately
Tracks:**

**+ Each Sales Representatives Account Management /
Account Development Performance**

**5. Implement Performance Development Meetings In Which Each
Sales Representative's Account Development Performance**

Is:

**+ Measured Against Their Assigned Account Management /
Account Development Goals.**

**6. Identify Areas In Which Each Outbound Sales Representative's
Customer Development Performance:**

- + Is Not Meeting Agreed Upon Account Management / Account Development Performance Goals.**

7. Develop Action Plans That Allow Each Sales Representative To Improve Their Skills To Where:

- + They Meet & Exceed Each Of Their Account Management / Account Development Goals**

8. Obtain Agreement From Each Sales Representative:

- + That Each Account Management / Account Development Category In Which They Are Under Performing Is Important**
- + One That They Agree To Work With You To Improve**

**Looking For Ways To Increase
Profitable Sales Growth?**

**Let Us Custom Design A Profitable
Account Management /
Account Development Solution**

**That Will Meet The
Unique Business Needs Of Your
Outbound B2B Telephone**

Sales Organization

**Improving the
Performance Monitoring
Sales Process
of
Outbound B2B Telephone
Sales Growth Strategies**

**Performance Monitoring
“A Window Of Understanding”**

**The Only Way To Understand Exactly
What’s Happening Within Your
Outbound B2B Telephone
Sales Organization
Is Through
A Properly Designed,**

Executed & Supported, Performance Monitoring System

A Constant Sales Organization - “Pulse”

Properly Developed & Implemented - The Performance Monitoring Component Of Your Sales Growth Strategy

Maintains A Constant Pulse On Each Person, Process And Productivity Measurement Within Your Sales Organization

Ensuring Profitable Sales & Customer Growth Performance is Being Achieved & Maintained

“Problem Diagnosis”

If There Is A Problem Within The Design Of A Process Anywhere Within The Sales Organization – Or In The Sales Growth Strategy Designed To Govern It ...

A Properly Designed, Implemented & Supported Performance Monitoring System Will Quickly & Clearly Identify The Root Cause Of The Problem & What Needs To Be Done To Correct It!

Performance Monitoring Targets

Performance Monitoring Within The Sales Organization Is Focused On 3 Main Areas:

- 1. Sales Productivity**
- 2. Sales Performance**
- 3. Customer Performance**

Sales Force Productivity

Is The Sales Organization's Ability To Maximize The Utilization Of Its Key Resources (e.g. time, effort, people and money)

Sales Force Performance

Is The Sales Organization's Ability To Maximize Its Rate & Profitability Of Return On Its Customer Contact Efforts

Customer Satisfaction

Is The Sales Organization's Ability To Provide Profitable Solutions That Effectively Meet Target Customer Needs

The Value of Effective "Performance Monitoring"

The Results Achieved When A Sales Organization's Efforts Are Effectively Monitored:

- 1) Prospects & Customers Are Managed & Developed Properly**
- 2) Company Solutions Are Represented Effectively**
- 3) Sales Force Productivity & Performance Are Maximized**
- 4) Continuous Profitable Sales & Customer Growth Are Achieved & Maintained**

Performance Monitoring - "Profitable Ideas"

Here Are A Number Of Ideas That Have Proven To Be Effective Performance monitoring Processes:

- 1. Use A Web Based System To Monitor Performance**

- a. Allowing Salespeople To View & Study
Their Performance From Home**
 - 2. Create An Online “Quota / Bonus Calculator”**
 - a. That Allows Salespeople To Easily Determine
Extra Income For Extra Effort**
 - 3. Provide On Going Personal & Professional**
 - a. Goal Setting & Goal Achievement Training**
 - 4. Add Motivational Goal Setting Quotes**
 - a. To All Performance Monitoring Reports**
 - 5. Relentlessly Reinforce The Value & Importance Of**
 - a. Establishing & Attaining Personal & Professional
Goals**
 - 6. Salespeople Are Wanderers By Nature, On Average**
 - a. They Will Wander Away 33% Of Their Time
If Not Monitored Effectively**
-

Effective Performance Monitoring Requires Continuous Reinforcement

**It Is Important To Remember That “Performance Requirements”
Are To Be:**

- Clearly Stated In The Job Description**
- Reviewed With Each Sales Representative
As Part Of The Recruiting Process**
- Agreed On & Signed By Each Sales Rep.
As Part Of Their Hiring Agreement**

- **Studied & Tested During Sales Training**
- **Communicated Regularly & Effectively**
Once Salespeople Graduate To The Sales Floor

Setting Proper Performance Expectations

**Establishing Performance Standards At The Hiring Stage
Solidifies The Foundation Of The Credibility & Trust Needed
To Effectively & Continuously Improve Sales Performance.**

Performance Monitoring Processes That Achieve Profitable Performance Results

Performance Monitoring Target - Examples

**Here Are Some Examples Of Profitable Performance Monitoring
Processes In Each Of The 3 Key Areas:**

Customer Performance Monitoring

**The Following Report Monitors The Customer Acquisition &
Development Performance Of Individual Sales Team Members &
Includes The Following Information:**

- 1. # Of New Customers Acquired**
- 2. Total Sales From New Customers**

3. # Of Orders From New Customers
4. # Orders / New Customer
5. Sales / New Customer
6. # Of New Customers With 2 Orders
7. % Of New Customers With 2 Orders
8. # Of New Customers With >2 Orders
9. % Of New Customers With >2 Orders
10. # Of Returns From New Customers
- 11.% Of Returns From New Customers

Outbound Excellence								
Customer Development by Account Manager								
	Barly	Gloria	Samuel	Kimberly	Rob	DK	Olivia	Total
New Customers 2007	53	249	82	147	109	53	50	743
New Customer Sales	\$ 11,326	\$ 42,203	\$ 16,261	\$ 20,064	\$ 21,637	\$ 9,744	\$ 7,224	\$ 128,382
New Customer Orders	80	438	135	224	160	83	73	1193
Orders / Customer	1.51	1.76	1.65	1.52	1.47	1.57	1.46	1.61
Sales / Customer	\$ 214	\$ 169	\$ 200	\$ 136	\$ 199	\$ 184	\$ 144	\$ 173
Avg. Customer Rating	5.9	6.1	6.0	5.7	5.8	5.8	5.4	5.8
Multi-Buyers	15	28	31	50	32	20	13	187
% Multi-Buyers	28.3%	5.9%	37.8%	34.0%	29.4%	37.7%	26.0%	25.2%
Multi-Buyers >2	5	117	11	15	9	6	5	168
% Multi-Buyers >2	9.4%	47.0%	13.4%	10.2%	8.3%	11.3%	10.0%	22.6%
Returns	14	37	4	17	14	9	9	104
% Returns of Orders	17.5%	14.9%	3.0%	7.6%	8.8%	10.8%	12.3%	8.7%

Customer Performance Monitoring

The Previous Report Monitored The Customer Acquisition & Development Performance Of New Customers By Individual Sales Team Members.

The Following Report Measures - Net Gain / Loss In Active Buying Customers - By Sales Division & Includes:

- 1. # Of Active Buying Customers**
- 2. # Of Outbound Sales Representatives**
- 3. # Of Active Buying Accounts / Sales Rep.**
- 4. Total Revenue Of All Active Buying Accounts**
- 5. # Of Active Accounts w/Increasing Revenue**
- 6. # Of Active Accounts w/Decreasing Revenue**
- 7. Total Increase In Revenue From Accounts With Increasing Revenue (2007 vs 2006)**
- 8. Total Decrease In Revenue From Accounts With Decreasing Revenue (2007 vs 2006)**
- 9. # Of New Accounts**
- 10. # Of Lost Accounts (Rev in '06 vs No Rev in '07)**
- 11. Total Revenue Earned From New Accounts**
- 12. Total Revenue Lost From The Loss Of Active Accounts**

Outbound Excellence			
Active Customer - Gain / Loss Analysis			
	Sales Reps. Over 90%	Sales Reps. Under 90%	Sales Reps. Totals
# of Active Accounts	458	305	763
# of Sales Reps	14	17	31
Average # of Active Accounts Per Sales Rep	32.7	17.9	24.6
2007 Revenue from All Active Accounts	\$ 3,686,536	\$ 1,822,952	\$ 5,509,488
# of Sales Reps	14	17	31
Average Revenue of Active Accounts Per Sales Rep	\$ 263,324	\$ 107,232	\$ 177,725
# of Accounts with Increasing Revenue	354	211	565
# of Sales Reps	14	17	31
Average # of Accounts with Increasing Revenue / Rep.	25.3	12.4	18.2
2007 Revenue from all Increasing Accounts	\$ 1,564,926	\$ 743,622	\$ 2,308,548
# of Sales Reps	14	17	31
Average Revenue Gain From Increasing Accounts / Rep.	\$ 111,780	\$ 43,742	\$ 74,469
# of Accounts with Declining Revenue	430	308	738
# of Sales Reps	14	17	31
Average # of Accounts with Decreasing Revenue / Rep.	30.7	18.1	23.8
2007 Revenue Loss From Declining Revenue Accounts	\$ (1,001,341)	\$ (1,329,288)	\$ (2,330,629)
# of Sales Reps	14	17	31
Average Revenue Loss From Decreasing Accounts / Rep.	\$ (71,524)	\$ (78,193)	\$ (75,182)
New Accounts in 2007 - #	128	62	190
2007 Revenue From New Customers	\$ 400,982	\$ 192,815	\$ 593,797
Lost Accounts in 2007 - #	261	157	418
2007 Revenue Lost From Inactive Customers	\$ (282,267)	\$ (284,053)	\$ (566,320)

Sales Performance Monitoring

The Following Sales Performance Monitoring Report Tracks Historical Invoiced Revenue By Account Manager. The Report Includes:

1. Total Invoiced Revenue / Account Manager In 2005
2. Total Invoiced Revenue / Account Manager In 2006
3. Change In Revenue / Account Manager 2006 vs 2005
4. Total Invoiced Revenue / Account Manager In 2007
5. Change In Revenue / Account Manager 2007 vs 2006
6. Projected Invoice Revenue / Account Manager 2008
7. Change In Invoice Revenue / Account Manager / Projected 2008 vs 2007

Outbound Excellence							
Annual Sales Growth / Outbound Sales Representative							
	2005	2006	Delta	2007	Delta	2008	Projected
	Invoiced Revenue	Invoiced Revenue	2006 vs 2005	Invoiced Revenue	2007 vs 2006	Projected Through May	Delta 2008 vs 2007
Allana	-	180,414	180,414	470,322	289,908	710,094	\$ 239,772
David	318,644	318,423	(221)	528,258	209,835	748,953	\$ 220,695
Manny	125,634	173,317	47,683	207,049	33,732	415,347	\$ 208,298
Ray	299,876	409,129	109,253	413,805	4,676	576,132	\$ 162,327
Karly	245,611	404,289	158,678	740,231	335,942	873,516	\$ 133,285
Perry, Bob	263,564	340,701	77,137	478,969	138,268	603,726	\$ 124,757
Gloria	181,567	324,419	142,852	305,706	(18,713)	405,162	\$ 99,456
Tom	79,623	254,678	175,055	329,724	75,046	386,550	\$ 56,826
Samuel	28,366	105,876	77,510	230,523	124,647	273,405	\$ 42,882
Georgie	405,659	425,675	20,016	468,383	42,708	501,888	\$ 33,505
Mike	68,628	172,878	104,250	218,815	45,937	245,832	\$ 27,017
Matthew	106,154	96,778	(9,376)	143,685	46,907	169,995	\$ 26,310
Gina	135,076	86,996	(48,080)	107,218	20,222	129,999	\$ 22,781
Mike	5,418	45,768	40,350	53,967	8,199	68,850	\$ 14,883
Richard	-	33,797	33,797	57,868	24,071	61,428	\$ 3,560
Danny	476,805	540,039	63,234	915,421	375,382	917,250	\$ 1,829
Alan	37,630	64,308	26,678	289,373	225,065	279,318	\$ (10,055)
Sammy	231,439	261,676	30,237	366,265	104,589	350,268	\$ (15,997)
Marissa	68,847	67,980	(867)	73,082	5,102	53,790	\$ (19,292)
Bill	88,058	165,444	77,386	68,217	(97,227)	45,792	\$ (22,425)
Tammy	21,197	65,096	43,899	98,846	33,750	75,891	\$ (22,955)
Kimberly	247,787	217,708	(30,079)	259,639	41,931	230,422	\$ (29,217)
Calvin	79,699	93,997	14,298	236,832	142,835	196,581	\$ (40,251)
Stephen	-	18,117	18,117	128,092	109,975	69,870	\$ (58,222)
Corey	104,978	138,960	33,982	326,835	187,875	254,862	\$ (71,973)
Paula	407,304	627,421	220,117	784,246	156,825	666,447	\$ (117,799)
Jason	429,300	414,892	(14,408)	465,968	51,076	339,351	\$ (126,617)
Caudell	71,452	185,670	114,218	427,264	241,594	278,343	\$ (148,921)
Mary	569,548	704,832	135,284	767,507	62,675	-	\$ (767,507)
	\$5,097,864	\$6,939,278		\$9,962,110		\$9,929,062	\$ (33,048)

**Performance Monitoring Processes
That Improve
Profitable Sales Performance**

An “Ideal” Bundled - Performance Monitoring Solution

**This Performance Monitoring Report Is Part Of A “Bundled”
Performance Monitoring System That Is Ideal For Virtually
“Any” Outbound Sales Organization.**

**From A “Start-Up” To A Sales Organization That Has Already
Proven Its Ability To Achieve Profitable Sales & Customer
Growth Performance.**

Designing An Ideal Performance Report

The Following Report Is Effective Because It Reflects The Broadest Range Of Challenges That Face Outbound Telephone Sales Organizations. The Report Includes:

Sales Organization – Sales Performance & KSI Report				
Net Shipped Sales	Net Margin %	# Orders	# of Active Buyers	# Acct Execs
Net Ship Sales / Day	Net Margin \$	Net Shipped Orders / Day	# of Active Buyers / Day	Talk Time / Rep
Sales / Rep / Day	Net Margin \$ / Day	Average Order Size	New Customers	Calls / Rep
Freight %	Cost of Goods %	Average Line Items	New Customers / Day	Contest Cash

There Are Many Potential Advantages To The Following Performance Monitoring Report Including:

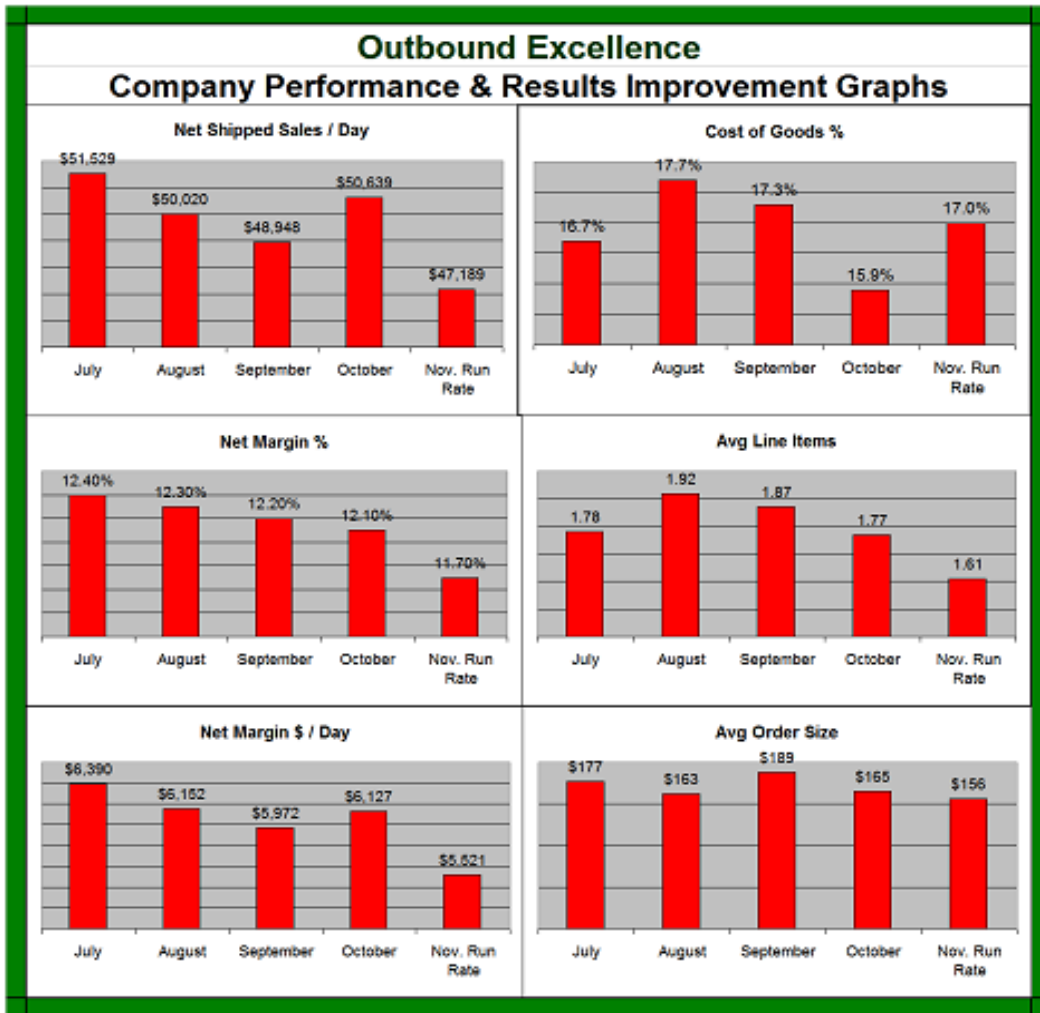
- 1. Measuring MTD As Well As Historical Performance**
- 2. Compares Actual Performance To Quota**
- 3. Includes The Variance For Each Item Monitored**
- 4. Includes A Revenue Improvement Action Plan**
- 5. Includes A Profit Improvement Action plan**

Outbound Excellence									
Company Performance / Month-To-Date									
Wednesday, 11/29/07									
	Quota	11/28/2007	Nov. Run Rate	% of Quota	Variance	October	September	August	July
#Business Days	22	20				20	23	20	22
Net Shipped Sales	\$ 1,057,057	\$ 943,786	\$1,038,165	98.2%	\$ (18,892)	\$ 1,012,773	\$ 1,125,810	\$1,080,395	\$ 1,133,648
Net Ship Sales / Day	\$ 48,048	\$ 47,189	\$ 47,189	98.2%	\$ (859)	\$ 50,639	\$ 48,948	\$ 50,020	\$ 51,529
Sales / Rep / Day	\$ 522	\$ 695	\$ 665	127.4%	\$ 143	\$ 649	\$ 550	\$ 595	\$ 520
Cost of Goods %	16.4%	17.0%	17.0%	103.7%	0.006	15.9%	17.3%	17.7%	16.7%
Freight %	3.0%	2.4%	2.4%	80.0%	(0.006)	2.9%	2.9%	3.1%	3.1%
Coolest Cash	\$ 20,000	\$ 18,545	\$ 20,400	102.0%	\$ 400	\$ 19,511	\$ 16,595	\$ 15,920	\$ 16,104
Net Margin %	12.90%	11.70%	11.70%	103%	(0.003)	12.10%	12.20%	12.30%	12.40%
Net Margin \$	\$ 126,847	\$ 110,423	\$ 121,465	104%	\$ (5,382)	\$ 122,545	\$ 137,349	\$ 123,049	\$ 140,572
Net Margin \$ / Day	\$ 5,766	\$ 5,521	\$ 5,521	104%	\$ (245)	\$ 6,127	\$ 5,972	\$ 6,152	\$ 6,390
# Orders	5,873	6,048	6,653	113.3%	780	6,070	6,417	5,551	6,410
Net Shipped Orders / Day	267	302	302	113.3%	35	304	279	288	291
Avg Order Size	\$ 180	\$ 156	\$ 156	86.7%	\$ (24)	\$ 165	\$ 189	\$ 163	\$ 177
Avg Line Items	1.80	1.61	1.61	89.4%	(0.19)	1.77	1.87	1.92	1.78
# of Active Bayers	7,047	7,218.00	7,983	113.3%	936	8,271.00	7,035.00	6,230.00	6,302
# of Active Bayers / Day	320	366	402	125.5%	82	331	346	308	328
New Customers	2000	2101	2311	115.6%	311	1256	1711	1354	1654
New Customers / Day	91	78	86	95.0%	(5)	82	85	78	77
# Acct Execs	92	78	78	84.8%	(14)	78	89	89	99
Talk Time / Rep	182	180	180	98.9%	(2)	172	163	158	152
Calls / Rep	75	74	74	98.7%	(1)	72	75	73	55
Revenue Improvement Objectives									
1) Prospecting New Business - 2000 New or Reactivated					4) 12 Documented Call Coaches Each Day				
2) Reassignment of all Inactive & Unassigned Accounts					5) Testing & Use of Results / Values Mandatory				
3) Special Promotions & Galleys Each Week					6) HEADCOUNT!!!				
Profit Improvement Objectives									
1) Training for add-ons					3) Increase Shipping & Handling by 5%				
2) Limit all promotions to COGs % @ budget					4) Chargeback to Sales Associate all Free Freight				

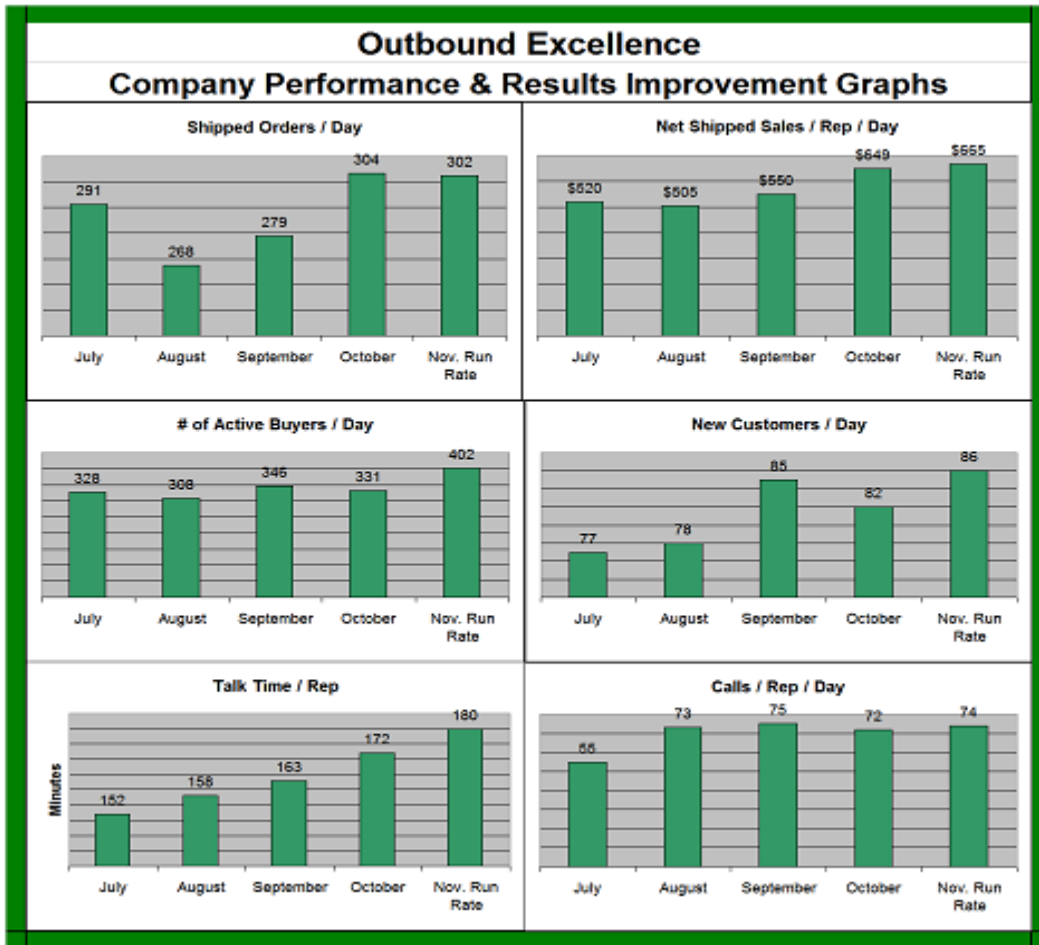
Another Key Benefit

Of This Performance Monitoring Report Is:

- ✚ It Translates Changing Trends Into Color Coded Graphs
- ✚ Providing Visual Identification Of The Factors That Are Influencing Sales, Profits & Customer Growth In Both Negative & Positive Manners



This “Cause & Effect” Report
Provides “Higher Impact” Topics
For Analysis & Discussion
At
Departmental & Companywide
“Results Improvement Meetings”



Historical Performance Analysis

An Additional Component Of This “Bundled” Performance Monitoring Solution:

- ✚ **It Transitions Monthly Performance Data & Trends Into A Quarterly Performance Monitoring Report**
- ✚ **Allowing An Enterprise To Identify, Compare & Analyze Current Changes In The Performance Of Any Key Influencer Against Those Of The Last Quarter(s), Or Over The Past Year(s) Of Performance**
- ✚ **Therefore Eliminating A Number Of The “Great Unknowns” That Have Complicated The Decision Making Process In The Past**

Monitoring & Pursuing Excellence

During Steady Times You Can Work On Improving Under Performing Components Of Your Sales Strategy

Peak Performance Periods

During Peak Performance Periods You're Able To Identify Areas Allowing Your Organization To Earn Market Share From Competitors

So You Can “Laser Focus” Your Organization’s Efforts On Developing & Executing Strategies That Will Accelerate Market Share Growth During Those Brief And Infrequent “Windows Of Opportunity.”

Net Loss / Gain In Active Buying Customers

Another Of Our Most Popular Performance Monitoring Reports Effectively Monitors Net Loss / Gain In Active Buying Customers

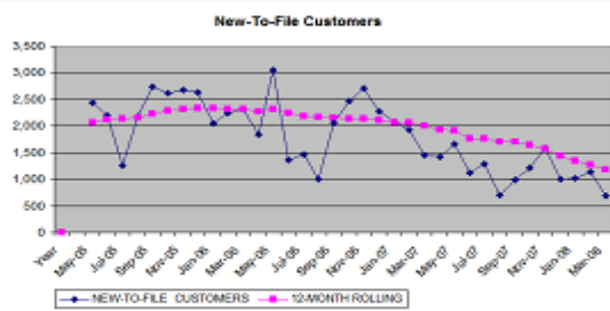
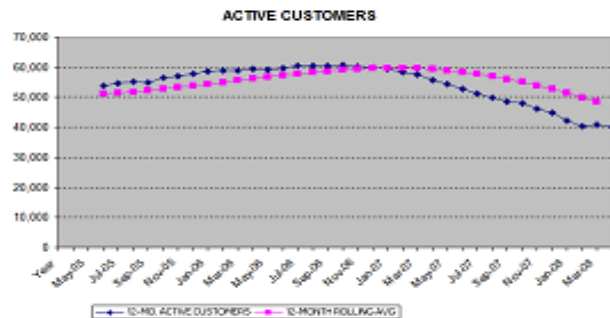
- ✚ You'd Be Amazed At The # Of Companies That Spend Excessive Money To Attract New Buying Customers**
- ✚ Only To Discover That They Are Losing More Active Customers On The Backend**
- ✚ Than They Are Acquiring On The Front End**

Outbound Excellence Net Loss / Gain In Active Customers

Month	12 Month Active Customers	12 Month Rolling Avg - Active Customers	12 Month Repeat Customers	Monthly New To File Customers	12 Mo Rolling Avg	Customer Becoming Inactive	Net gain / Loss Active Customers
Oct-05	50,203	53,198	49,125	1,078	1,568	1,612	(534)
Nov-05	50,203	52,796	49,197	2,095	1,588	2,006	-
Dec-05	49,575	52,274	47,909	1,000	1,583	2,294	(628)
Jan-06	49,797	51,853	47,876	1,921	1,607	1,690	222
Feb-06	50,427	51,550	49,143	2,279	1,659	1,649	630
Mar-06	50,720	51,285	49,378	2,342	1,708	2,049	293
Apr-06	50,866	51,075	49,677	2,189	1,756	2,043	146
May-06	51,497	50,932	49,071	2,426	1,825	1,795	631
Jun-06	51,375	50,830	49,087	2,298	1,877	2,410	(122)
Jul-06	52,549	50,848	50,196	2,353	1,938	1,179	1,174
Aug-06	52,754	50,917	50,347	2,407	2,002	2,202	205
Sep-06	53,808	51,126	51,499	2,439	2,070	1,255	1,184
Oct-06	54,515	51,417	52,315	2,200	2,123	1,623	577
Nov-06	55,026	51,788	53,789	1,257	2,136	746	511
Dec-06	54,963	52,156	52,795	2,188	2,150	2,231	(43)
Jan-07	56,427	52,683	53,692	2,735	2,233	1,291	1,444
Feb-07	56,996	53,236	54,382	2,614	2,286	2,045	569
Mar-07	57,700	53,796	55,030	2,670	2,316	1,966	704
Apr-07	58,555	54,399	55,927	2,628	2,338	1,773	855
May-07	58,885	55,015	56,840	2,045	2,327	1,715	330
Jun-07	58,960	55,592	56,745	2,245	2,313	2,140	105
Jul-07	58,461	56,214	57,146	2,315	2,315	1,844	471
Aug-07	59,084	56,716	57,248	1,836	2,275	2,213	(377)
Sep-07	59,730	57,253	58,682	3,048	2,325	2,402	646
Oct-07	60,541	57,761	59,176	1,265	2,242	554	811
Nov-07	60,419	58,215	59,948	1,471	2,196	1,583	(122)
Dec-07	60,517	58,638	59,516	1,001	2,166	903	98
Jan-08	60,787	59,084	59,716	2,071	2,157	1,801	270
Feb-08	60,096	59,300	57,631	2,465	2,136	3,156	(691)
Mar-08	59,933	59,592	57,233	2,700	2,143	2,863	(163)

Outbound Excellence # of Active Customers + New to File Customers

Month & Year	12 MO. ACTIVE CUSTOMERS	12-MONTH ROLLING AVG	NEW-TO-FILE CUSTOMERS	12-MONTH ROLLING AVG
May-05	53,808	51,126	2,439	2,070
Jun-05	54,515	51,417	2,200	2,123
Jul-05	55,026	51,788	1,257	2,136
Aug-05	54,963	52,156	2,188	2,150
Sep-05	56,427	52,683	2,735	2,233
Oct-05	56,996	53,236	2,614	2,286
Nov-05	57,700	53,796	2,670	2,316
Dec-05	58,555	54,399	2,628	2,338
Jan-06	58,885	55,015	2,045	2,327
Feb-06	58,960	55,592	2,245	2,313
Mar-06	59,461	56,214	2,315	2,315
Apr-06	59,084	56,716	1,836	2,275
May-06	59,730	57,253	3,048	2,325
Jun-06	60,541	57,761	1,265	2,242
Jul-06	60,419	58,215	1,471	2,196
Aug-06	60,517	58,638	1,001	2,166
Sep-06	60,787	59,084	2,071	2,157
Oct-06	60,096	59,300	2,465	2,136
Nov-06	59,933	59,592	2,700	2,143
Dec-06	59,277	59,713	2,270	2,112
Jan-07	58,419	59,703	2,077	2,070
Feb-07	57,439	59,592	1,834	2,061
Mar-07	55,589	59,330	1,458	2,001
Apr-07	54,337	58,936	1,418	1,932
May-07	52,772	58,450	1,693	1,919
Jun-07	51,141	57,790	1,123	1,770
Jul-07	49,796	56,961	1,291	1,765
Aug-07	48,525	56,046	708	1,706
Sep-07	47,828	55,078	885	1,735
Oct-07	46,160	53,952	1,213	1,639
Nov-07	44,800	52,725	1,587	1,571
Dec-07	42,068	51,405	996	1,440
Jan-08	40,333	49,946	1011	1,343
Feb-08	40,711	48,584	1139	1,271
Mar-08	39,919	47,236	685	1,176





**Looking For Ways To Increase
Profitable Sales & Customer Growth**

**Let Us Custom Design A Profitable
Performance Monitoring Solution**

**That Will Meet The
Unique Business Needs Of Your
Outbound B2B Telephone
Sales Organization**

**Improving the
Performance Development
Sales Process
of
Outbound B2B Telephone
Sales Growth Strategies**

Improving Profitable Growth Performance

If You Have Effectively Designed, Implemented & Supported The Previous 10 Components Of Your Outbound B2B Telephone Sales & Customer Growth Strategy, You Now Have:

- 1. Recruited, Hired & Trained The:**
 - Top 10% Of The Qualified Sales Candidates In Your Job Market**
- 2. A Signed Contract That Details The Specific Performance Goals & Objectives:**
 - Each Sales Representative Has “Agreed” To Achieve**
- 3. Provided Each Sales Representative With A Book Of Qualified Leads Complete With:**
 - Detailed Company Profiles**
 - Confirmed Contacts**
 - Valid Business Reasons To Call**
 - Effective Pre-Call Planning Strategy**
- 4. Reinforced The Expectation Of Achieving & Maintaining**
 - High Levels Of Performance & Profitability**
- 5. Provided Regular Call Coaching Sessions Ensuring All Sales Representatives:**
 - Improve Their Tactical Selling Skills & Their Understand Of Strategic Selling Concepts**

6. Developed & Implemented Account Development Tools

That Improved the Sales Organization's Ability To:

- **Increase The Profitable Sales Growth Of Their Active Buying Accounts**
- **Established Sales Development Initiatives For Each Account Manager Based On Their Performance & Individual Development Needs**
- **Provided A Follow-Up System To Ensure That Increasingly Higher Levels Of Account Management & Account Development Skills Are Being Achieved and Maintained.**



**With These Processes Now In Place
It Is Time To Design & Implement
Your Performance Development Strategy**



Performance Development – Components

There Are Two Components To An Effective Performance Development Strategy.

Ongoing Development

**Daily Guidance & Leadership For Sales Representatives
Meeting Agreed Upon Performance Commitments**

Situational Development

Performance Program Tailored For Sales Representatives

Unwilling / Unable To Meet Agreed Upon Performance Standards



Keys To Developing Effective Performance Development Strategies



Obtain – Review – Agree - Cycle

**In The Interview Process Productivity & Performance Goals
Are Reviewed With Each Outbound Sales Representative**

**In The Hiring Process Each Sales Representative Is Required To
Sign An Agreement To Achieve Specific Performance Goals**

**So The Corner Stone For Each Performance Development Session
Should Be The Review Of The Performance Agreement**

Praise Over Performance

**After Reviewing The Performance Agreement Congratulate Each
Sales Representative For Areas In Which :**

- ✚ Their Performance Exceeds Agreed Upon
Performance Goals**

Discuss Underperformance

**Review Performance Areas In Which Results Are Not Meeting
Agreed Upon Performance Goals And:**

- ✚ **Discuss Ideas for Improving Performance
In Their Underperforming Areas**

Obtain Agreement To Improve Performance

**The Sales Representative Must See A Clear Benefit In Attaining
Each Stated Goal:**

- ✚ **So Obtain Agreement That Each Goal Is Important &
There Is Mutual Agreement To Work Together To
Achieve Each Goal**
- ✚ **No Agreement = No Improvement**

Develop An Effective Action Plan

**The Level Of Success Of Any Performance Development Plan
Lies In The Effective Development & Execution Of The Action
Plan.**

An Effective Action Plan Will Include:

- ✚ **Initial Agreed Upon Goals**
- ✚ **Actual Performance To Goals**
- ✚ **Giving & Receiving Feedback**
- ✚ **Action Steps For Achieving Goals**
- ✚ **Clear Expectations Of Expected Results
To Be Achieved**
- ✚ **How Success Will Be Measured**
- ✚ **Timelines & Resources Required**
- ✚ **Commitments Of Development Mgr.**
- ✚ **Commitments Of Sales Representative**
- ✚ **Scheduled Follow-Up Meeting**

Keep The Focus On “The Future”

Discussions That Focus On Past Problems & Behaviors Result In The Person Being Coached Becoming Tense And Defensive:

- + Leaving The Focus Of Their Feedback On Justifying Their Behaviors And Actions**
- + Rather Than On Positive Ideas They Have For Improving Their Performance**

“Execution & Follow-Up”

Talking About Developing Improved Performance Is Easy Because Talking Requires:

- + No Commitment**
- + No Discipline**
- + No Follow-Up**
- + No Leadership Skills**

Talking Results In “No Progress”

But Talking About Improving Performance Without An Effectively Written Action Plan & An Effective Follow-Up System Is The Least Effective Method For Achieving Improved Performance.

- + It’s Also The Most Common**

97% Performance Improvement Failure Rate

Of The Time Sales Managers Work On Developing Performance The Method They Use Is:

- ✚ Verbal**
- ✚ On The Spot**
- ✚ No Written Action Plan**
- ✚ No Formal Follow-Up**

Benefits Of An Effective Follow-Up System

- ✚ Ensures Action Steps Are Understood**
- ✚ Ensures Actions Steps Are Executed**
- ✚ Ensures Desired Results Are Achieved**
- ✚ Allows For Modification Of Action Steps**
- ✚ Provides Opportunity For Recognition**
- ✚ Reinforces Commitment To Success**

When Performance Coaching No Longer Works

Sometimes No Matter How Bad You Want A Sales Representative To Achieve Success, Or How Hard You Try In Working With A Sales Representative To Improve Their Performance:

- 1. You Are Left With No Other Valid Option Than To Terminate Their Employment**

Key Reasons Salespeople Fail

- 1. They Have No Written Goals Or A Defined Plan For Achieving Their Goals**
- 2. Their Ego Overrides Their Desire To Listen And Learn From Others**
- 3. They Become Selfish & Care Only About What's In It For Them**
- 4. Fear / Uncertainty / Doubt – Leads Them To Blame Others Or Simply Give Up**
- 5. They Refuse To Cope With Change And Try New And Better Ways**
- 6. They Lack An Understanding Of The Value Of A Proven Sales System**

Protecting Your Investment

For Those Times When You Are Forced To Terminate A Sales Representative, Your Account Transition Strategy:

-  Will Protect Your Investment In The Terminated Sales Representatives**

**Improving the
Employee Termination /
Account Transition
Sales Processes
of your
Outbound B2B Telephone
Sales Growth Strategy**

Expect Turnover

**An Unfortunate Aspect Of Outbound B2B Telephone Sales
Is The High Rate Of Turnover With An Industry Average
Of More Than 50% Annually.**

Prepare For Turnover

**Although It Must Always Remain A Primary Objective
Of An Organization's Leadership Team To Reduce Turnover**

**✚ An Organization Must Be Prepared
For Turnover When It Does Occur**

Plan For Turnover

**There Are Companies Today That Have Experienced Turnover
Of Hundreds Of Salespeople, And To This Day:**

- ❖ **Do Not Have An Effective Account Transition Strategy In Place**
- ❖ **To Ensure The Customer Relationships & Profitability Of Transitioned Accounts From Terminated Sales People Are Maintained.**

Transitioning Of “Free Commission” Accounts

The Transitioning Of “Free Commission” Accounts Earned By Terminated Sales Reps., To The “Squeaky Wheel” Sales Reps.,

- ✚ **Is One Of The Most Common & Most Profit Inhibiting Mistakes Made In Outbound Sales Organizations Today!**

How Squeaky Wheels – “Ruin The System”

In Every Outbound Sales Organization There Are ways That Experienced Sales People Learn How To “Work The System” To Their Advantage.

The Most Profitable Way – Profitable Only To The Sales Person – But Highly Unprofitable To The Company:

- ✓ **Is To Sell Sales Leaders On Why They Deserve To Take Over Accounts From Salespeople That Are Being Terminated.**

It Seems To Make Sense

Without The Proper Supporting Data, It Would Seem To Make Sense To Transition Terminated Accounts To The Same Old Experienced Salespeople That Market For All Termed Accounts.

However, In The Majority Of Cases We Have Analyzed Over The Past 12 Years, That Is Not The Decision That is In The Best Interest Of The Company, The Customer, Or The Overall Sales Organization.

The Choice: Stagnant or Sweet Spot

How To Transition Accounts From Terminated Sales Representatives Is A Subject That Has Been Through Much Heated Debate.

Universally, The Debate Boils Down To Whether To Transfer Accounts From Terminated Sales People To:

- **To Sales Representatives With More Tenure
(But Often With A Much Poorer Work Ethic)**
- **Or To Newer, Yet More Driven, Harder
Working & Oftentimes More Deserving Reps**

Quad Matrix – Confirms Stagnant or Sweet Spot

No One Wins An Argument – So To Support Our Belief That It Is Too Often That Stagnant Reps Are The Ones That Squeak The Loudest For “Free Accounts” – We’ve Developed Our Quad Matrix Process – To Support Our Claim:

		Outbound Excellence													
		Margin Contribution + Customer Contact Time - Quad Matrix													
		High Margin + Low Contact Time						High Margin + High Contact Time							
\$28,000	Invoiced Margin Dollars							MS							
\$26,000															
\$24,000															
\$22,000															
\$20,000									PF						
\$18,000															
\$16,000							DA	MB							
\$14,000						CC	MA								
Break Even															
			Low Margin + Low Contact Time						Low Margin + High Contact Time						
\$10,000							SW						MM		
\$8,000							CC								
\$6,000						BC			JJ	DD					
\$4,000					DL			AB							
\$2,000						RN				AM					
\$0						DF									
		Customer Contact Time													
		120	130	140	150	160	170	180	190	200	210	220	230	240	250

Monitoring Transitioned Accounts

Many Years Ago We Developed A Performance Monitoring Process That Tracked The Changes In Revenue From Active Buying Customers After Their Re-Assignment To Another Account Manager

- ❖ As A Result Of The Previous Account Manager's Termination

Outbound Excellence								
Account Transition - Transitioned Account Analysis								
	2008 Total	2007 Total	2008 YTD (Jan - Mar)	2008 Run Rate	2008 Run Rate vs 2007 Actual	Reason for Decline in Sales	2014/2007 Transitioned From	Transitioned To
Donnelley	\$11,650	\$6,500	\$1,250	\$ 5,800	\$ (1,500)	Closed Det Ctr	Date	Jim
Barton	\$12,450	\$8,500	\$508	\$ 2,200	\$ (8,300)	Unhappy w/Service	Date	Jim
Blue Max	\$8,700	\$40,500	\$2,806	\$ 8,800	\$ (2,500)	Product Not Good Fit	Date	Jim
Nordwin	\$6,750	\$5,250	\$1,250	\$ 5,800	\$ (250)	Happy - Not As Resp	Date	Jim
Gil	\$4,250	\$5,500	\$2,500	\$ 18,200	\$ 6,700	Increase - Acquisition	Date	Jim
Propell	\$3,850	\$6,500	\$858	\$ 2,400	\$ (2,100)	Won't Return Calls	Date	Jim
Hudson RTI	\$2,500	\$2,250	\$758	\$ 2,800	\$ 750	Increase - Status Quo	Date	Jim
Farmerson Inc.	\$1,500	\$850	\$0	\$ -	\$ (850)	Not Target Acct - Small	Date	Jim
Jones Electronics	\$8,500	\$1,250	\$2,250	\$ 9,800	\$ 7,250	Increase - New Product Add	Date	Jim
							\$45,700	\$ 45,800
Marwell	\$2,250	\$2,000	\$275	\$ 1,100	\$ (900)	Not Target Acct - Small	Date	Steve
Stargate	\$23,000	\$42,000	\$2,500	\$ 18,800	\$ (2,800)	Won't Return Calls	Date	Steve
Anderson Mfg	\$12,500	\$40,500	\$3,500	\$ 14,800	\$ 2,500	Increase - Added New Site	Date	Steve
Evacco	\$6,500	\$1,500	\$1,250	\$ 5,800	\$ (2,500)	Business Is Slow	Date	Steve
Lifeline	\$ 7,500	\$ 5,800	\$ 2,000	\$ 8,800	\$ 3,800	Increase - Added Service	Date	Steve
Rhodes Inc	\$ 2,200	\$ 2,500	\$ 500	\$ 2,200	\$ (200)	Not Target Acct - Small	Date	Steve
Beare Dist	\$ 3,850	\$ 5,200	\$ -	\$ -	\$ (5,200)	Switched Vendors - Price	Date	Steve
Raymond Foods	\$ 8,500	\$ 1,200	\$0	\$ -	\$ (1,200)	Not Target Acct - Small	Date	Steve
							\$41,300	\$ 40,200
Fast Access	\$ 12,250	\$ 850	\$ 400	\$ 1,800	\$ 950	Increase - Upgrade Complete	Date	Ben
Genesco	\$ 6,500	\$ 5,800	\$ 1,500	\$ 6,800	\$ 1,800	Increase - New Product Added	Date	Ben
SDC Inc	\$ 5,200	\$ 4,500	\$ 250	\$ 1,800	\$ (1,500)	Not Happy All Left	Date	Ben
Savers	\$ 3,850	\$ 5,200	\$ 1,500	\$ 6,200	\$ 1,800	Increase - Happy With Us	Date	Ben
SMC	\$ 2,500	\$ 3,500	\$ -	\$ -	\$ (2,500)	Switched Vendors - Price	Date	Ben
Americorp	\$ 1,500	\$ 2,500	\$ -	\$ -	\$ (2,500)	Not Target Acct - Small	Date	Ben
Fry's	\$ 8,500	\$ 1,250	\$ 250	\$ 1,400	\$ 150	Increase - Contract Renewed Q3	Date	Ben
							\$ 22,300	\$ 16,400
Totals	\$166,950	\$113,800	\$25,625	#####	(\$11,300)			

Down The Profit Drain

What We Discovered Is That In A Typical Outbound B2B Telephone Sales Organization, Accounts Transitioned To A New Account Manager As A Result Of A Termination Will:

- **Decrease In Margin Dollar Performance By 35%**

Retaining Bad Hires

This Is One Of The Key Reasons “Why” Organizations “Do Not” Terminate Sales Representatives, Even When They Are:

- ✓ **Detrimental To The Organization’s Performance & Culture**

How To Protect Your Investment

**The Same Accounts That Will Decline By A Minimum Of 35%
When Transitioned To A New Account Manager As A Result Of
A Termination Under An Average Account Transition System**

- ❖ **Will Increase By An Average Of 15%**
- Using An Outbound Excellence**
- Account Transition Solution**

Outbound Excellence													
Account Transition - Qualification Matrix													
Account Manager	Avg Talk Time	RANK	Quota	RANK	Avg Line Items	RANK	Monthly Buyers	RANK	Returns	SCORE	OVERALL Score	Final Rank	Accts Assigned
David K	3:55	3	103%	1	1.5	4	19.00%	1	3.78%	3	12	1 A	
Gloria J	3:28	7	96%	3	1.8	1	15%	3	4%	4	18	2 B	
Samuel K	3:15	10	97%	2	1.7	2	8.30%	6	3.30%	1	21	3 C	
Karly N	3:54	4	94%	4	1.8	1	5.00%	8	4.20%	5	22	4 E	
Daniel D	3:47	5	97%	2	1.6	3	7.30%	7	4.20%	5	22	4 D	
Mary B	3:18	9	92%	6	1.5	4	15.70%	2	3.60%	2	23	5 F	
Alan M	3:43	6	92%	6	1.6	3	12.80%	4	4.60%	6	25	6 n/a	
Ben C	3:18	9	91%	7	1.5	4	9.70%	5	4.20%	5	30	7 n/a	
Art B	4:03	1	94%	4									
Cheryl C	3:19	8											
Dan L													
Carol C													
Mark S													
Denny F													
Suzy Q	4:01	2	93%	5									

Phase #IV

Pre-Designed, Tested & Proven

Profitable Sales Growth Processes

Step #1 - Job Description

- ❖ **Fallacy vs Reality**
- ❖ **Outbound B2B Telephone Sales Rep.**
- ❖ **Outbound Sales Manager**

- ❖ Director of Outbound Sales
- ❖ Vice President of Outbound Sales
- ❖ Channel Manager
- ❖ Sales Recruiter
- ❖ Sales Leads Coordinator

Step #2 - Compensation & Incentive

- ❖ Understanding Gross Margin
- ❖ 12% Commission Margin Dollar vs Draw
- ❖ Progressive Gross Margin w/ Bonus
- ❖ Mentor - Mentee / Hunter - Gatherer Plan
- ❖ New Hire Base + KSI Bonus

Step #3 - Recruiting

- ❖ Top Recruiting Sources
- ❖ Recruiting Performance Report
- ❖ Telephone Screen - Pre-Qualifier
- ❖ Summary Of Phone Interview
- ❖ Ideal Sales Candidate Profile Analysis
- ❖ New Sales Reps Budget vs Actual
- ❖ New Hire Performance Recruiting Bonus

Step #4 - Hiring / Sales Force Sizing

- ❖ Calculating The Cost Of Bad Hires
- ❖ Recruiting and Hiring Benefits
- ❖ Behavioral Interviewing Questions
- ❖ Pre-Evaluating Sales People Before Hiring
- ❖ Prospecting Exercise Instructions
- ❖ Business Plan Exercise
- ❖ Quick Quota Calculator
- ❖ Offer Letter Account Manager
- ❖ IT Set-Up Form New Hires
- ❖ Final Notes On Developing A Strategy

Step #5 - Sales Training & Development

- ❖ Sales Training & Development Schedule
- ❖ Sales Training Classroom Rules
- ❖ Progress Monitoring Testing Modules
- ❖ Product Knowledge Analysis
- ❖ Professional Development Analysis
- ❖ Company Knowledge Analysis
- ❖ Industry Knowledge Analysis
- ❖ Key Sales Initiatives
- ❖ Adherence To Sales System
- ❖ Strategic vs Tactical Selling

- ❖ **New Hire Prospecting Strategy**
- ❖ **Sales Call Roadmap Tactical**
- ❖ **Prospecting Profiler and Qualifier**
- ❖ **Account Profile Map**
- ❖ **Responding To Common Objections**
- ❖ **Concede And Then Proceed**
- ❖ **Feature Advantage Results**
- ❖ **Product Sales Value Matrix**
- ❖ **Top Products Sold**
- ❖ **Top Products Comparison Matrix**
- ❖ **Sales Promotion Map**
- ❖ **Standardized Closing Statements**
- ❖ **ROI Calculator**
- ❖ **Feedback Survey**
- ❖ **On Going Development Plan**

Step #6 - Sales Leads / Account Assignment

- ❖ **Lead Team Responsibilities**
- ❖ **Policies and Procedures**
- ❖ **Top Customers By Margin**
- ❖ **Top Customer Markets Analysis**
- ❖ **Target Industry Market Analysis**
- ❖ **Target Market Penetration Analysis**
- ❖ **Target Market Strategy**
- ❖ **Key Lead Sources**
- ❖ **Territory Assignments**
- ❖ **Account Allocation Policy**
- ❖ **Lead Source Tracking Report**
- ❖ **Lead Request Tracking Report**
- ❖ **Lead Distribution Report**
- ❖ **Quarterly Performance Report**
- ❖ **Lead Requests vs Sales Performance**

Step #7 - Performance Goals

- ❖ **Daily Call Tracker**
- ❖ **Daily Goals Planner**
- ❖ **Critical Success Factors**
- ❖ **Achieving High Performance Goals**
- ❖ **Sales Forecast Update Individual**
- ❖ **Sales Forecast Update Team**
- ❖ **Sales Forecasting By Account**
- ❖ **Sales Forecasting Yr 1**
- ❖ **Calculating Sales Quotas**
- ❖ **Annual Sales Quota Matrix**
- ❖ **Sales Quotes Status Report**
- ❖ **Call Coaching Schedule**
- ❖ **Account Benchmarks by AM**
- ❖ **Customer Dials Self Audit Report**
- ❖ **Historical Tracking Call Performance vs Goals**
- ❖ **Sales Management Initiatives**

Step #8 - Selling Skills

- ❖ **3 Keys To Achieving Profitable Sales and Customer Growth**
- ❖ **10 Tips for Maximizing Call Coaching Performance**
- ❖ **Achieving Peak Performance Getting Into The Flow**
- ❖ **Call Coach Form**
- ❖ **Call Coacher + Pre-Call Planner**
- ❖ **Call Coaching Form**
- ❖ **Call Coaching Tips**
- ❖ **Large Account Selling Strategy**
- ❖ **Large Opportunity Planner Tracker**
- ❖ **Strategic Accounts Profile Matrix**
- ❖ **Understanding Customer Needs**
- ❖ **Value Matrix Good Better Best**
- ❖ **Value Matrix Products**
- ❖ **Value Matrix Services**

Step #9a - Account Management

Account Audit Report New Hire
Account Audit Matrix
Account Research
Acquisition Retention Analysis
Active Buying Accts Sales By Month
Analysis of New Service Customers
Change In Customer Buying Patterns
Company Performance Report
Cross Ref Intl Loc Key Accts
Customer Satisfaction Action Plan
Detailed Account Potential Analysis
Last Activity Report

Lost Customer Inquiry Letter
Net Loss Gain In Customers Analysis
New Customer Report
Reasons For Lost Accounts
Top 50 Customer Tracking Report
Top Customer Overdue Buyers Report

Step #9b - Account Development

- ❖ **Active and New To File Customers Analysis**
- ❖ **Appreciation Gift Tracker**
- ❖ **Back Order Report**
- ❖ **Best Selling SKUs vs Total SKUs**
- ❖ **Calculating Customer Value**
- ❖ **Customer Acquisition Retention Performance Report**
- ❖ **Customer Appreciation Gifts Policy**
- ❖ **Customer Development by AM**
- ❖ **Customer Gift Selection**
- ❖ **Growth Initiatives Tracker**
- ❖ **Historical Average Sales Per Customer**
- ❖ **Historical Re-buy Rate**
- ❖ **Large Opportunity Qualification Tracking Form**
- ❖ **Multi-Buyer Trends Historical**
- ❖ **Multi-Buyer Trends Monthly**
- ❖ **New Customer Report**
- ❖ **Sales By Loc & Mfg**
- ❖ **Sales By Rev Segment**
- ❖ **SKUs to Eliminate**
- ❖ **Thank You Letter Top Customer**
- ❖ **Top Selling Products Qtr Trends**
- ❖ **Volume Pricing Schedule CD Media Sleeves**
- ❖ **Volume Pricing Schedule CD Media**
- ❖ **Volume Purchasing Agreement**
- ❖ **VPA Policies and Procedures**
- ❖ **VPA Request Form**

Step #10 - Performance Monitoring

- ❖ **Subjective New Hire Review**
- ❖ **AM MTD & YTD Invoiced Sales**
- ❖ **Annual Sales Growth Per Sales Representative**
- ❖ **Daily Performance Report**
- ❖ **Monthly & YTD Sales KSI vs Goal**
- ❖ **MTD Company Performance**
- ❖ **MTD YTD Invoiced Sales by AM**
- ❖ **New Hire Audit 1 of 3**
- ❖ **New Hire Audit 2 of 3**
- ❖ **New Hire Audit 3 of 3**
- ❖ **Sales Quote Tracker**
- ❖ **Vacation and Sick Day Tracker**

Step #11 - Performance Development

3 Step Process
Action Planner
Assigned Accounts Audit & Action Plan
Individual Development Status Report
Individual Initiatives Tracking Report
PIP Written Warning
Quad Coaching Matrix
Results Improvement Strategy

Step #12a - Employee Termination

Exit Interview Questionnaire
Exit Interview
Reasons For Termination
Separation Checklist
Severance Letter

Step #12b - Account Transition

Qualification Matrix
Transitioned Account Analysis

Trade-Off: Benefit vs Challenge

The Nice Part About Process Improvement Is That If Done Properly, An Organization Can Systematically & Indefinitely:

- + Cut Costs**
- + Improve Productivity & Performance**
- + Increase Profitable Sales Growth**

The Challenge Of Course Is That It Takes:

- + A Great Deal Of Time, Energy & Resources**
- + As Well As A Great Deal Of Expertise**

To Execute A Complete Profitable Sales Growth Strategy Profitably & Effectively.

Which Is Why Many Companies Turn To Us For Help.

Why Clients Seek Our Help

For Those Organizations That Prefer To Conduct “In House” Process Improvement Efforts, The Information Contained In This Guide Is All The Information Needed To Execute A Process Improvement Strategy That Can Significantly:

- + Cut Costs**
- + Improve Productivity & Performance**
- + Increase Profitable Sales Growth**

For Those Companies That Would Prefer Our Assistance In Designing, Implementing & Supporting A Process Improvement Strategy...

In Addition To Our Knowledge & Expertise In Process Improvement, We Also Offer:

- + Over 120 Pre-Designed, Pre-Tested & Pre-Proven – Profitable Sales Growth Processes**
- + Full Implementation & Support Services**
- + In House Seminars & Training**
- + Telephone & On-Line Support Options**
- + Post Implementation Monitoring**
- + Regularly Scheduled Check-Ups**

**Outbound Excellence's
Profitable Sales Growth Processes**



**Outbound Excellence Provides Sales Leaders
with Sales Growth Tools and Coaching
Services That Allow Them to Maximize Sales,
Profits and Customer Growth Performance.**

**David Kalstrom
Outbound Excellence
877-337-2674**

www.outboundexcellence.com