

# What Is Sales Process Data Collection?

Sales Process Data Collection  
Is

Obtaining Useful Sales Process Information.

The Issue Is Not: *How Do We Collect Data?*

It Is: *How Do We Obtain Useful Data?*

# Why Collect Sales Process Data?

To Establish A Factual Basis  
For Making Sales Process  
Improvement Decisions

*I Think The Problem With The Sales Process Is . . .  
Becomes The Data Indicate The Problem Is . . .*

# **Making A Sales Process Data Collection Plan**

*Why Do We Want The Data?*

*What Purpose Will They Serve?*

**Formulate Your Change Statement:**

*If . . . then . . .*

# Making A Sales Process Data Collection Plan

## *Where Will We Collect The Data?*

- Refer To The Process Flowchart
- Identify Steps Where You Expect Change
- Take Data At Those Steps And At The End Of The Process

# Making A Sales Process Data Collection Plan

## *What Type Of Data Will We Collect?*

- **Attribute Data**  
Presence or absence of a characteristic
- **Variables Data**  
Specific Measurement

# **Making A Sales Process Data Collection Plan**

## *Who Will Collect The Data?*

### **Workers Who Perform The Process Steps**

- Properly Trained
- Provided With Resources

# **Making A Sales Process Data Collection Plan**

## **How Do We Collect The Right Data?**

- Small Sample Sizes
- Collect Frequently
- Dependent On Availability  
Of Data, Cost, Consequences

# Sales Process - Data Collection Plan

## Potential Problems

### *Failure To Establish Operational Definitions*

- When And How Often To Collect Data
- How To Collect Data
- Units Of Measurement
- Criteria For Defects
- Handling Of Multiple Defects

# **Sales Process - Data Collection Plan**

## **Potential Problems**

### *Adding Bias To The Collection Process*

- Slowdown Or Speedup
- Fear
- Errors In Procedures
- Missing Data

# **Sales Process - Data Collection Plan Uses For Check Sheets**

- Record Data For Further Analysis
- Provide Historical Record
- Introduce Data Collection Methods

# Sales Process - Check Sheets

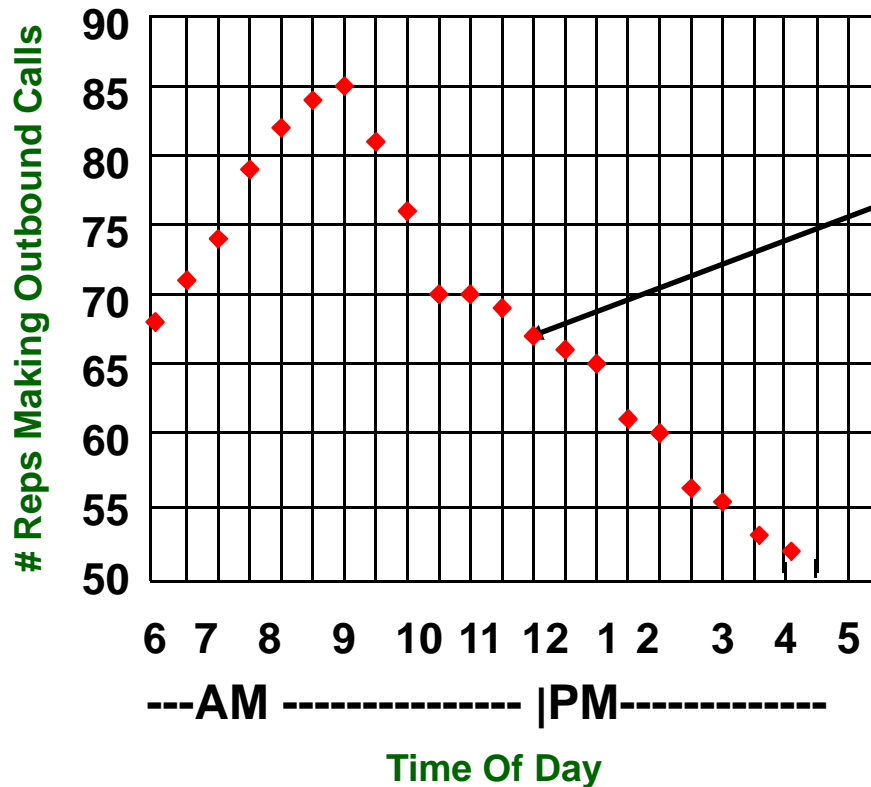
## Tabular Format

**# of Sales Presentations / Day by Sales Reps. On Development Plans - May 2008**

<b>Account Manager</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>TOTAL</b>
<b>Samuel Keaton</b>								<b>40</b>
<b>Gloria Jean</b>								<b>39</b>
<b>David Alan</b>								<b>40</b>
<b>Robert James</b>								<b>41</b>

# Sales Process - Check Sheets

## Graphic Format



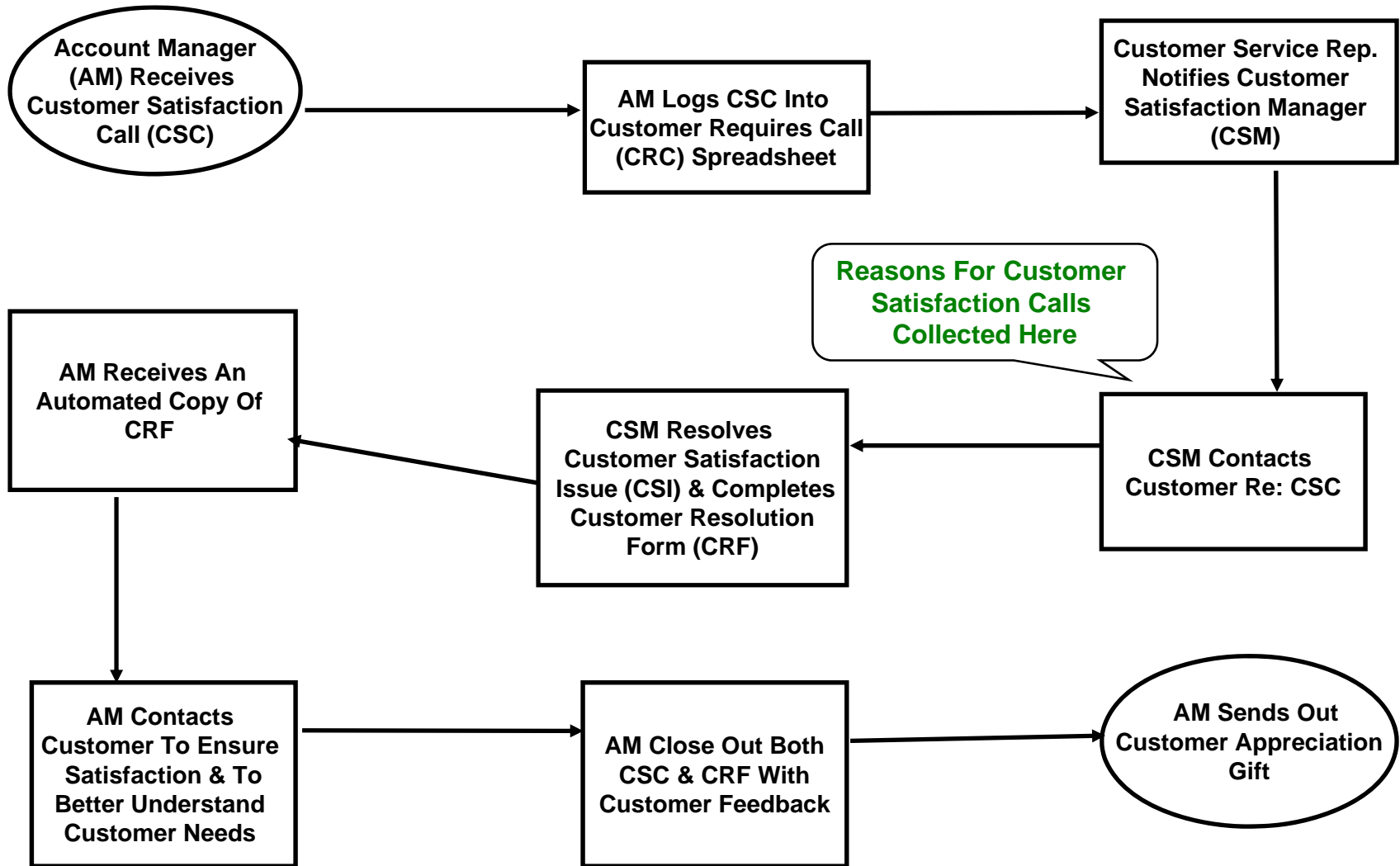
Workers plot each data point on the graph

# **Sales Process - Check Sheets**

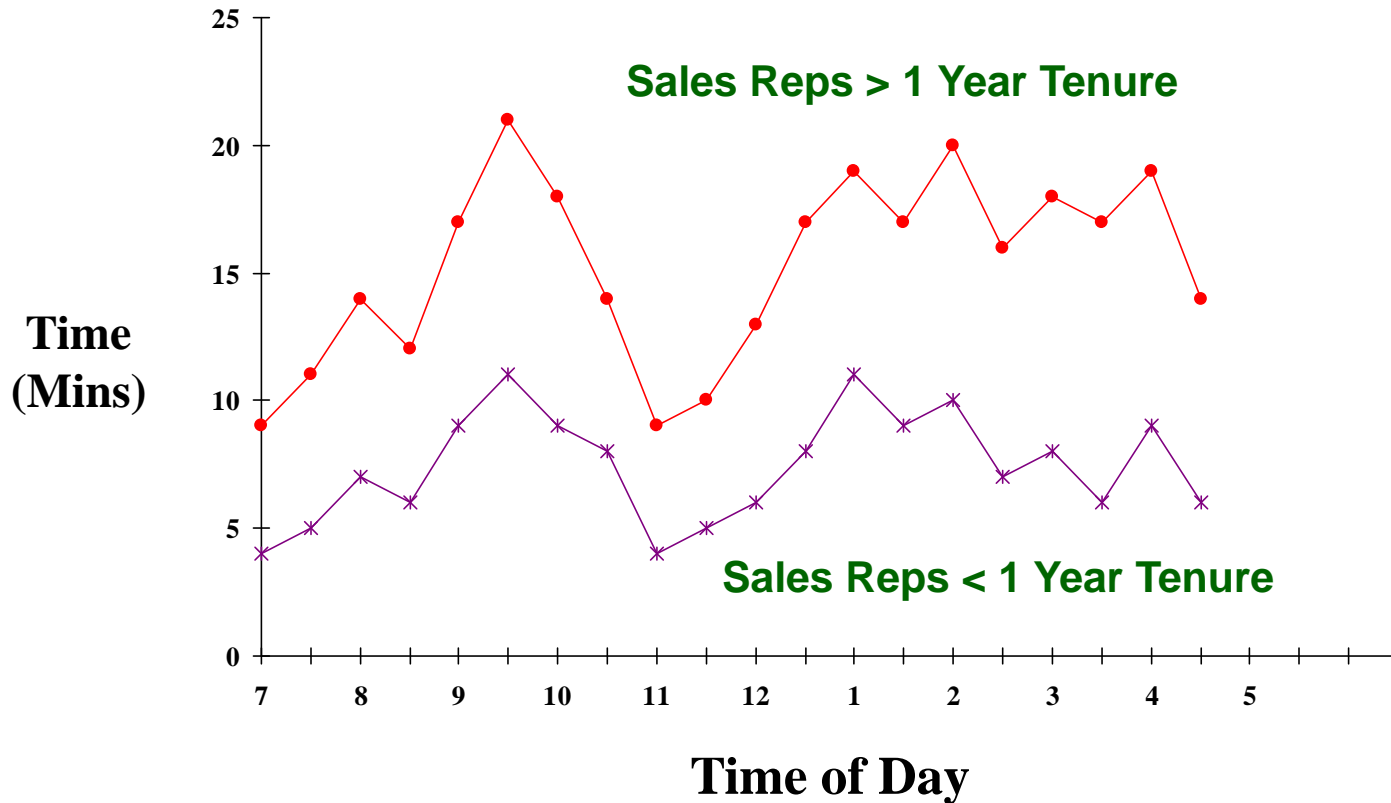
## **Making A Useful Check Sheet**

- Tailored For Specific Purpose
- Workers Help Develop Form
- Columns Labeled Clearly
- User-Friendly Format

# Sales Process Example Flowchart

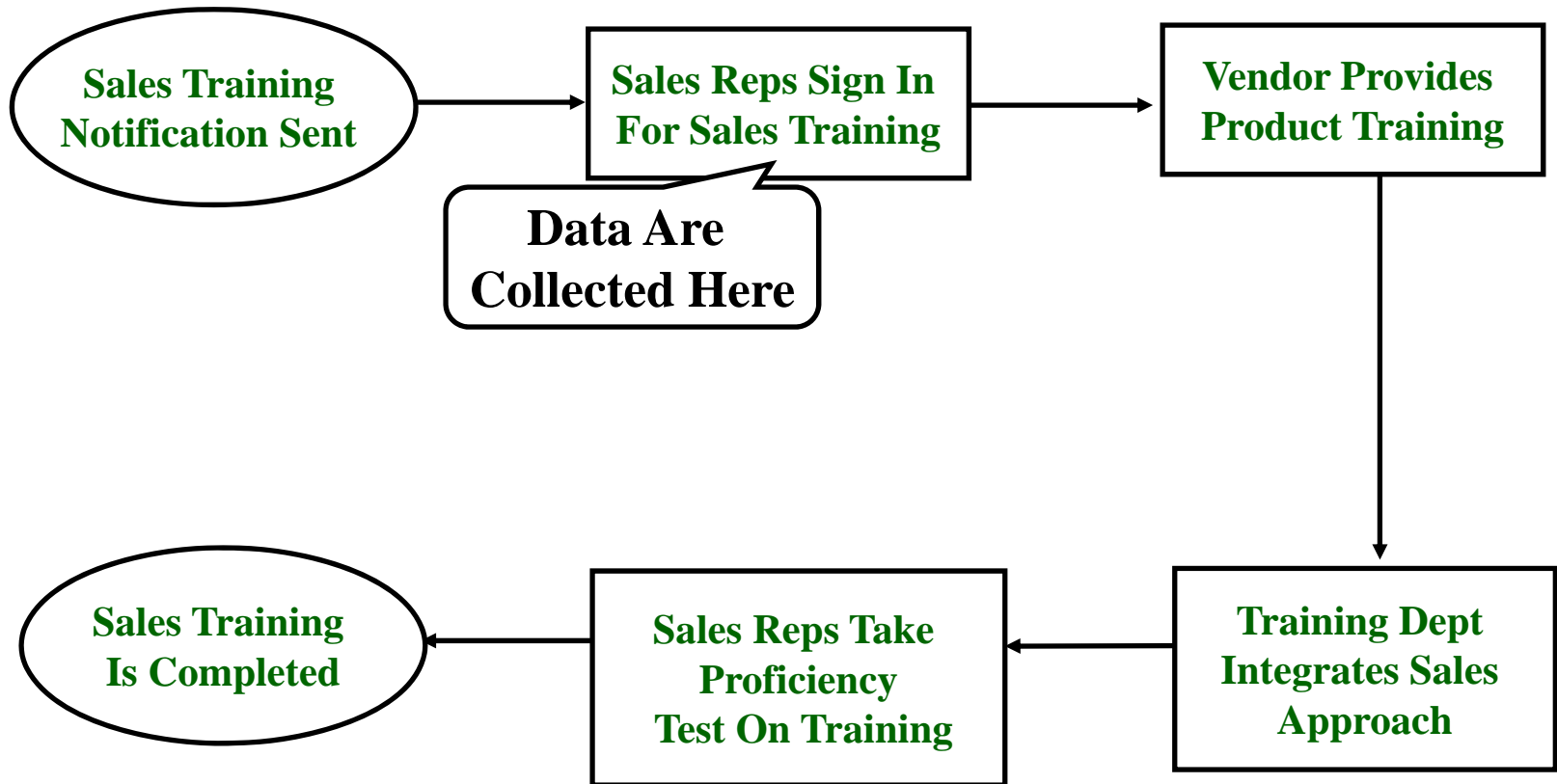


# Sales Process – Check Sheet Example



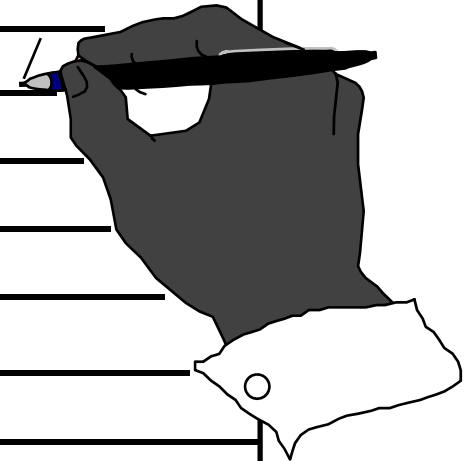
**LEGEND: ACER - 16 April 2008 - # of Minutes On Each Sales Presentation – New vs Experienced Reps.**

# Sales Process Gateway Example Flowchart



# Sales Process Gateway Example Checklist

Score	# New Hire Reps	Score	# of Exp. Reps
50%		50%	
55%		55%	
60%		60%	
65%		65%	
70%		70%	
75%		75%	
80%		80%	
85%		85%	
90%		90%	
95%		95%	
100%		100%	



**LEGEND: Proficiency Scores On Sales Training – April 2008 – Advanced Chemicals**

# Sales Process Improvement Check Sheet Example

Sales Training - Test Scores	COUNTS
50%	1111
55%	11111
60%	1111111
65%	1111111
70%	1111111111
75%	1111111111
80%	1111111111
85%	1111111
90%	1111
95%	11

Data Taken: Computer Wholesalers – April 2008 – Minneapolis Minn.

# Sales Process – Check Sheet Example

## Quota Achievement

DATA COLLECTORS  
SIMPLY PLACE AN X  
ON THE CHECKSHEET

<b>Number Of Sales Representatives</b>	22									
	20									
	18			XX	XX	XX				
	16			XX	XX	XX				
	14			XX	XX	XX				
	12			XX	XX	XX				
	10			XX	XX	XX	XX			
	8			XX	XX	XX	XX			
	6			XX	XX	XX	XX	X		
	4		X	XX	XX	XX	XX	XX		
	2		XX	XX	XX	XX	XX	XX		
0										
		80%	85%	90%	95%	100%	105%	110%	115%	120%

**Percent Of Invoiced GM Quota Achieved**

Data Taken: International Importers – April 2008