

Manage and Improve Performance

Provided courtesy of www.GrowthPanel.com

Note – This is one from a sequence of exercises from the Sales Management subject outlined in the Strategic Marketing Process eBook. Download the free e-book www.growthpanel.com/marketing-tools/index.html and subscribe to this subject at www.growthpanel.com/versions/get-started.html to download from Growth Panel's Intelligent Marketing Platform.

Some of the graphics in this PDF might not display properly.

SALES REP EVALUATIONS

To get the best from your team, go on calls with them to truly understand how well they are doing in all areas of the sales process. By participating in this way, you'll also gain more firsthand and credible knowledge about what's working and how the market is responding to your company's products & services.

Most good sales reps are strong in just one or two of the major areas listed below. Your best measurement is RESULTS – are your reps hitting their numbers? If not, use the matrix to identify areas for improvement and then follow the coaching tips (later in this section) to help them improve.

You may also consider restructuring your team to have the people with particular strengths spending > 90% of their time in their area. For example, an outstanding prospector who isn't as good in person might be better off handling lead generation & qualification for the entire team.

SALES CALL EVALUATION FORM

Spend some time on sales calls with your reps and rate them on each section. With new reps, you may want to do this once a week to ensure they're progressing. With seasoned reps, you may only need to perform this every few weeks/months, depending upon their experience and skill level.

(5 = excellent; 1 = poor)

REP	
DATE	

Prospecting Skills

Most sales reps love to present and close but hate to prospect – yet prospecting is what keeps the pipeline full. Be creative. Think of how companies you see or read about or people you meet can lead to potential prospects. Great prospects can be found in news stories, in magazine articles, or from referrals from friends.

PROSPECTING	RATING (1-5)	COMMENTS
Quantity of new leads generated		
Quality of new leads generated		
Prospecting consistency		
Finds decisionmaker		
Identifies & involves other stakeholders		
Accurately qualifies the prospect		
Average		

Presentation Skills

Good sales reps can quickly identify pain and bring the right benefits and solutions to life.

PRESENTATION SKILLS	RATING (1-5)	COMMENTS
Quickly identifies the prospect’s true pain; the faster the rep does it, the faster s/he can close.		
Builds rapport		
Presents in a compelling way with focus on how the p/s will solve the prospect’s problem		
Interactivity: Involves the customer		
Industry knowledge – prospects like to buy from experts and authoritative figures, and more industry knowledge can only help.		
Establishes trust – “People buy from people.” Trust, rapport and credibility in a B2B sale will often overcome price and		

PRESENTATION SKILLS	RATING (1-5)	COMMENTS
product/service objections.		
Confirms understanding – When answering questions, always confirm with the prospect that they understand. People often hesitate to speak up if they’re unclear.		
Doesn’t bash the competition. Being polite and respectful about the competition can also help establish trust.		
Doesn’t exaggerate. It’s better to say less about the product than to overstate its capabilities. Exaggerations or mistruths are extremely difficult to overcome.		
Asks questions – open-ended questions give you information. Closed-ended give you “yes” or “no” commitments. Use open-ended early in process, closed-ended to complete. More questions should be open-ended – be friendly and conversational. EX: That’s interesting. Could you tell me ... Don’t interrogate.		
Listens: Rule of thumb: good sales reps listen for more than 50% of time.		
Identifies objections – objections should be embraced, not shunned. It’s highly unusual for a prospect not to have an objection. If the rep can’t find it, they’re not doing a good job.		
Overcomes objections: If a rep doesn’t overcome any objections during the sales cycle, s/he probably won’t get the business.		
Represents your brand. The rep is the prospect’s primary connection with your company, so s/he must convey the traits that you’ve identified.		
Average		

Sales Process

SALES PROCESS SKILLS	RATING (1-5)	COMMENTS
Understands what the prospect needs at each step of the process.		
Delivers the right tools and information at each step.		
Uses the right messaging at each step.		
Moves prospect forward in acceptable timeframes.		
Sets expectations at each step of the sales process.		
Responds and delivers as promised.		
Average		

Closing

Most sales reps will call a prospect 2-3 times. Nearly half will follow up 4-5 times and only the top reps will make the 6-10 contacts necessary to get the business.

CLOSING SKILLS	RATING (1-5)	COMMENTS
Is persistent; asks for the sale multiple times.		
Effectively negotiates; doesn't give up anything without getting something in return.		
Average		

Expands the Relationship

Keeps the customer happy and continues selling.

EXPANDS THE RELATIONSHIP	RATING (1-5)	COMMENTS
Manages relationship effectively.		
Asks for referrals – calls to referrals always have higher closing % from cold calls. Ex.: 100 cold calls could yield 2 deals, while		

EXPANDS THE RELATIONSHIP	RATING (1-5)	COMMENTS
100 referral calls could yield 40 deals, or 20x the revenue for the same amount of work. The best times to ask for referrals are after completing a deal/order, when solving a problem or when delivering good news.		
Seeks additional opportunities – upselling to an existing customer in much easier than landing a new one.		
Average		

Time Management & Reporting

This is a challenging one because many top reps are weak in this area; weak closers are often stronger at reporting. Remember, a sales rep’s most valuable skill is his/her ability to convert a prospect to a customer.

TIME MANAGEMENT & REPORTING SKILLS	RATING (1-5)	COMMENTS
Accurately reports on progress (thru CRM or other reporting tools).		
Manages time effectively		
Effectively penetrates territory		
Average		

When you’ve filled out the form above, enter the average scores for each “category” in the grid below. By doing so, you can track the rep’s performance over time.

SALES CALL EVALUATION TRACKING FORM

REP	
-----	--

Date of review	Prospecting	Presentation	Sales Process	Closing	Relationship	Time management

Make sure you coach the rep on any area that scores 3.5 or lower or that's declining.

COACHING

Coaching is a key component of sales management. Every manager has a responsibility to deliver feedback to his or her team to correct mistakes, improve performance, and achieve goals. Treat your reps like a team and coach them to optimum performance.

MOTIVATION

The first thing to think about is **motivation**. Things like money, prestige, recognition, fear, or success motivate good sales reps.

Find out what motivates each of your reps and leverage it. Encourage reps to dream big and think about success. Top performers expect their dreams to come true. Mediocre performers don't.

REP	KEY MOTIVATORS	IDEAS FOR KEEPING THEM MOTIVATED

Refer to this list frequently. It can be a powerful reminder about what to focus on with each rep. As a manager, it's your responsibility to retain your team, and your best performers have plenty of job opportunities. Give them what they need most to feel inspired, motivated and valued.

In addition, here are some suggestions for keeping morale high.

SUGGESTION	EXPLANATION	NOTES
Catch them doing things right	Praise reps regularly for the things they do well. Reps like to feel valued and be	

SUGGESTION	EXPLANATION	NOTES
	recognized for their work.	
Celebrate successes, both individual and group	Employees want to contribute and feel valued, and celebrating success is an easy and fun way to do it.	
Encourage reps to help each other	Ask your top performer to identify something another performer does well, and to seek coaching from them on it.	
Remind reps not to take rejection personally	Rejection is a natural part of sales, but it's an unnatural part of human desire. Remind your reps that prospects aren't rejecting them, they're simply choosing not to purchase. Encourage reps to focus on finding those people who they can help, and not to worry about those they can't.	

DELIVER FEEDBACK

When you identify a rep whose performance needs work, schedule a private feedback session, or take the rep aside if immediate feedback is more appropriate. **Think feedback, not criticism.** Feedback is a softer term than criticism, as criticism can rile emotions and cause defense mechanisms that make people less responsive.

Be careful about coaching in front of other people, unless it's positive feedback, which is great to make public.

FEEDBACK MEETING NOTES

Use this form to prepare to deliver feedback to a rep, and then keep in his/her employee file.

Rep	
Feedback to deliver	
Date	

STEP 1: CLEARLY IDENTIFY THE AREA THAT NEEDS IMPROVEMENT	NOTES
<p>Create two-way dialogue. Rather than just jump into your feedback, ask open-ended questions that create dialogue. Learn why the rep did something a certain way, then ask if there's an alternative method that would produce better results.</p>	
<p>Explain why the tactic needs improvement. Good reps want to improve, so explain why the issue is important and how improvement will put goals in closer reach.</p>	
<p>Don't sugar coat. Feedback must be truthful and clear. If it's sugar coated, the recipient may not truly understand the message and its importance.</p>	

STEP 2: DEVELOP A SOLUTION	NOTES
<p>Ask for ideas. Empower your reps by asking them to create plan to change the tactic. This strategy leads to ownership of the deliverables and, typically, better implementation.</p>	
<p>Tie solution to goals. When the rep understands how the plan will help reach goals, there's more motivation to improve.</p>	
<p>Clearly lay out your expectations and dates. Without clear expectations and a defined plan, you may not see results.</p>	

STEP 3: MONITOR RESULTS	NOTES
<p>Document progress according to the schedule. If you don't take the follow-up process seriously, the rep won't either.</p>	
<p>Praise the rep for a job well done. If the rep hasn't improved, ask why and provide more coaching to hit the next goal.</p>	

STEP 3: MONITOR RESULTS	NOTES
<p>Keep an eye on results. Some tactics take practice and continued guidance, so keep an eye open to make sure they are implemented.</p>	

ASKING OPEN-ENDED QUESTIONS

If you have less-experienced reps on your team, you may need to teach them a great deal about sales and the sales process. Open-ended questions are a great way to quiz them, open up a dialogue, and provide immediate coaching on a daily basis.

Naturally, you can use these types of questions for more experienced reps as well!

OPEN-ENDED QUESTIONS	NOTES
What's your objective for the call or meeting?	
How will you learn about the customer's needs?	
Who is your competitor for the business and how are you different?	
What are the benefits you will stress?	
What are the most difficult objections that may arise, and how will you address them?	
Who are the key decision makers and influencers?	
What will be your next step?	
In what areas do you feel you can improve?	
What changes can you make in your routine to improve in these areas?	

ACTION PLAN FOR IMPROVEMENT

When you identify an opportunity for improvement, develop an action plan for the rep and coach him/her through the process.

Since people often respond best when they're focused on a single topic, start by prioritizing the opportunities.

REP			
AREA FOR IMPROVEMENT	RANK	COMMENTS	DATE COMPLETED

Once you've ranked the opportunities, develop an action plan for the top priority item, then move through the list as the rep shows results.

ACTION PLAN

REP		
DATE		
AREA FOR IMPROVEMENT		
WHAT SHOULD THE REP DO TO IMPROVE IN THIS AREA?		
RESULTS: Identify three checkpoints and measure the rep's progress at each checkpoint.	DATE	RESULT*
COMMENTS		

*Praise & encourage the rep for improvements. If you aren't seeing results, ask the rep why and coach the rep more closely for the next checkpoint.

Example: If a rep is qualifying and presenting to an acceptable number of prospects yet isn't hitting his/her revenue number, focus on closing. If they only ask for the business once and don't ask again after overcoming the first objection, set a requirement that they ask for the business 3 times FOR EVERY PROSPECT. Once they're comfortable with this, teach them to continue asking for the business after they overcome each objection. Remember, most deals close after the 5th NO.

WARNING SIGNS

Sometimes reps don't respond well to coaching or feedback. If you're seeing any of these reactions in a rep, here are some possible answers and actions to take:

REACTION	POSSIBLE ANSWERS	ACTION PLAN
<input type="checkbox"/> Not responsive to feedback	Uncomfortable with change; unwilling to risk new things; doesn't believe in themselves/you/company	Have a private discussion to address. Ask for their help.
<input type="checkbox"/> Shorter hours – coming in late and leaving early	Personal distractions; lack of motivation; looking for another job	Give direct feedback. Ask for a commitment to be on time.
<input type="checkbox"/> Blocks of time offsite unaccounted for	Personal distractions; lack of motivation; looking for another job	Your intuition should be able to tell when an under-performing employee is interviewing elsewhere. Sometimes it's best to let them go.
<input type="checkbox"/> Talking negatively about your product/service	Displeased about current situation/job	Give direct feedback, and ask the reasons for it. Termination may be necessary.
<input type="checkbox"/> Talking negatively about your company	Displeased about current situation/job	Give direct feedback, and ask the reasons for it. Termination may be necessary.
<input type="checkbox"/> Talking very positively about a competitor	Displeased about current situation/job	Give direct feedback, and ask the reasons for it.
<input type="checkbox"/> Consistently negative body language	More often than not, directed at you/the company more than at something else	Have a private discussion to address.

Use your best judgment when determining how to proceed. If the situation doesn't improve, see Letting Someone Go later in this section.

ENCOURAGE ONGOING EDUCATION

Great managers inspire their teams to continually improve their skills and performance. The field of sales (and your industry) is continually changing, and your team should have the desire and coaching to learn and grow.

The first step is to ask your team members to budget time and create a plan for learning and practice.

SAMPLE EDUCATION PLAN

Goal		
Start date		
End date		
Action plan	DATE	ACTION
How I will measure my success & know the goal has been met?		

Sales reps typically know areas that need improvement. Ask them to outline them for their continued improvement program. Here are sample ideas:

SAMPLE GOAL		SAMPLE ACTION IDEAS
<input type="checkbox"/>	Learn new closing techniques	Spend time with other sales reps in your company and others.
<input type="checkbox"/>	Improve your listening skills	Sit in a group conversation, listening only. Afterward, write down as much as you can remember about what everyone said.
<input type="checkbox"/>	Improve your performance	List your three weakest areas. Read a book or take a seminar on

SAMPLE GOAL		SAMPLE ACTION IDEAS
	across the board	each one and create an action plan for implementing the ideas you learn. Track your implementation and measure your results.
<input type="checkbox"/>	Become an authority on your product/service	Constantly improve your product and industry knowledge.
<input type="checkbox"/>	Become an industry expert	Join industry associations and subscribe to the industry magazines, journals or newsletters. When you read an interesting article, create a to-do list to act on that information. Develop ideas for speeches or short articles and approach the publications or events to publish, then figure out how to publish an article there or speak at an engagement.

Here is a matrix to help reps plan their ongoing training.

REP					
Type of education	Time budgeted / week (month)	Actual time completed in period 1	Actual time completed in period 2	Actual time completed in period 3	Actual time completed in period 4
Reading to improve sales skills					
Reading to improve industry knowledge					
Seminars					
Ride-alongs					
Other					

LETTING SOMEONE GO

Letting someone go can be uncomfortable and difficult for a manager and the rest of the team; however, when a team member is not meeting expectations and hasn't responded to coaching, you must consider whether that team member is wasting the company's time and money.

Please note that there are other considerations beyond those that are posed here; this advice is meant only as a general guideline to help you make this difficult decision.

REP		
CRITERIA		NOTES
<input type="checkbox"/>	Has the employee been on an action plan?	
<input type="checkbox"/>	Has the employee failed to improve within a reasonable timeframe?	
<input type="checkbox"/>	Does the employee understand the serious nature of the action plan and that lack of performance will lead to termination?	
<input type="checkbox"/>	Does the employee's performance negatively affect the team/company?	
<input type="checkbox"/>	Is the employee losing the company money?	
<input type="checkbox"/>	Is the company better off without the employee?	
<input type="checkbox"/>	Is the employee's skill set reasonably replaceable?	

If you've checked several boxes above, it may be time to let the employee go.

If you decide to terminate, here are some issues to keep in mind:

ISSUES	NOTES
<input type="checkbox"/> Make sure you've notified / discussed the issue with the appropriate people within the company.	
<input type="checkbox"/> Handle the process with respect for the employee. If it isn't handled professionally and courteously, you can seriously damage morale among other team members.	
<input type="checkbox"/> Handle the firing in private, potentially with another management witness if you feel it is helpful or necessary.	
<input type="checkbox"/> Explain the reasons for the termination and summarize the events that led to the decision.	

<input type="checkbox"/>	Write a letter of termination to document the process.	
<input type="checkbox"/>	Offer any reasonable help to the terminated individual in finding new employment.	
<input type="checkbox"/>	Notify the rest of the team as soon as possible after the event. Again, be professional and courteous about the terminated employee – you need to keep the respect of the rest of the team.	