

# THE DIRECTORS SALES AIDE MEMOIRE

from **Improving Results**

This document has been developed for those who aspire to lead and manage a truly professional and highly effective sales operation. It simply lists the best practice employed by true sales professionals. The brilliant execution of these processes will reward you with business growth, sustainability and improved return on investment from your sales and marketing operations.

## PLANNING AND PROCESS

### SALES CHARTER and PLAN

- Targets and objectives
- Marketing / lead generation
- Product portfolio
- Territory / account base
- Competitor analysis
- Time management
- Key ratios
- Prospect bank
- Win / loss reporting
- Key performance indicators

### ACCOUNT DEVELOPMENT PLANS

- Documented and regularly reviewed
- Joint business plan with client
- Major account workshops (with client?)

### MAJOR WIN PLANS

- Documented strategy for winning major opportunities

## REVIEWS AND MEETINGS

### SALES CONFERENCE

- Review / celebration of last year
- Awards / recognition
- Dinner / overnight stay
- Guest speaker
- Targets and objectives for this year
- New products launch
- Introduce marketing plan
- Launch bonus scheme and incentives for first quarter

### SALES MEETINGS

- List of attendees / reason for attending
- Book and publish dates for the year
- Distribute agenda e.g.
- Review sales performance by individual / team / directorate (year on year)
- Review major wins / losses
- Review major prospects
- Forecast future sales performance
- Review of marketing / lead generation
- Review performance by product / product group
- Review performance by territory / market
- Documented action plans (where required)
- Document and distribute action points

### ACCOMPANIED VISITS

- Should be conducted at least monthly with each sales professional
- Good opportunity for directors and managers from other departments to meet customers

### ONE TO ONE PERFORMANCE / DEVELOPMENT REVIEWS

- Quarterly reviews booked for the year
- Conducted in private with adequate preparation and time set aside
- Use a coaching approach to build rapport, trust and create a thought provoking and constructive meeting
- Agenda for reviews;
- Roles, responsibilities and objectives
- Sales plan/charter review
- Sales performance
- Activity performance
- Development of future business (prospect bank)
- Knowledge of current role

- Approach to work
- Contribution to the team
- Team feedback (managers only)
- Overall performance
- SWOT analysis
- Career aspirations
- Development plan
- Output to be documented and signed by both parties

### **CUSTOMER FEEDBACK**

- All members of the sales directorate are to enhance and be aware of customer feedback and to seek testimonials and case studies

### **TEAM FEEDBACK**

- All members of the sales directorate are invited to complete an upward feedback form every quarter
- On each occasion the Sales Director / Manager will present the results back to their team and agree an action plan to improve employee satisfaction

### **ANNUAL APPRAISAL / AWARDS**

The annual appraisal will build on the previous reviews and therefore avoid surprises for the appraisee.

Typical appraisal marking system;

1. Outstanding
2. Exceeds expectations
3. Fully acceptable
4. Some underperformance
5. Significant underperformance.

### **POOR PERFORMANCE / EXIT PROGRAMME**

- Documented, understood and deployed where appropriate
- Conforms to employment law

## RECRUITMENT AND INDUCTION

### FIRST IMPRESSION

- On time
- Clean
- Well dressed
- Eye contact
- Ready smile
- Hand shake
- Good communication
- Healthy looking

### PREPARATION

- Understanding of the job being applied for
- Understanding of our business
- Understanding of our market / competitors
- Quality and method of research
- Linking their attributes to our job
- Good questions

### QUALIFIED

- Structure and content of CV
- References / referees (feedback gained)
- Job related experience
- Job specific qualifications
- Technical knowledge
- IT skills
- Previous employment achievements
- Educational qualifications
- Other interests/achievements
- Employment stability
- Career progression
- Awards
- Periods of unemployment
- Sickness record
- Location
- Driving licence
- Availability

## ATTITUDE

- Alert
- Active
- Interested
- Interesting
- Thinking
- Thought provoking
- Logical
- Verbal clarity
- Listening skills
- Energy
- Enthusiastic
- Empowered
- Accountable
- Loyal
- Trustworthy
- Manage conflict
- Fears
- Worrying
- Outgoing
- Drive
- Self confidence

## CHARACTERISTICS

- Empathy
- Ego drive
- Service motivation
- Ego strength
- Optimism

## TESTS / ASSESMENTS

- Writing
- Numeric
- Presentation
- Selling
- Planning
- Logical thinking
- Telephone
- Time management
- IT

## THE JOB

- Start date
- Salary
- Bonus (does the bonus scheme reward exactly the behaviours and results required?)
- Personal details
- Bank details
- Target
- Territory
- Products
- Expenses
- Car / insurance
- Holidays
- Technology
- Trial Period
- Contract
- Sales plan
- Company sales presenter
- Reporting

## INDUCTION PROGRAMME

- Introduction to the company, people, processes and quality system
- Sign health and safety plan
- Provision of equipment, e mail address, business cards, order forms and brochures
- Documented induction / training plan (pass / fail?)
- Documented roles, responsibilities and objectives
- Dates and format for reporting and manager reviews
- Sales meeting structure and timescales
- Appointment of mentor/coach

## RETURN ON INVESTMENT

- Total gross margin generated
- Total cost of marketing and sales
- Contribution from marketing and sales
- New customer acquisition
- Customer retention
- League tables of performance, activity and prospect value by salesperson

### REMEMBER

Sales should be a dynamic, high energy and completely professional directorate