



Sales Effectiveness Planning Guide For Sales Managers

"It's not the people...it's the process!"



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SALES EFFECTIVENESS PLANNING GUIDE FOR SALES MANAGERS

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INTRODUCTION

For twenty-five years, Cargill Consulting Group, Inc. has distinguished itself with its unique approach to sales productivity improvement. Our motto, ***“It’s not the people... it’s the process”***, sums up a philosophy that has enabled us to consistently improve revenue for our clients by as much as 200%.

Our experience with over 5,000 business-to-business sales forces has taught us that the processes used to build, manage and improve a sales organization are outdated. Most sales improvement programs focus on only one, or a handful, of what we have identified as the 17 Components of Sales Success: all of the factors that contribute to profit and loss. In order to optimize sales profitability, *all* of the components must be adjusted. Any program that does not do so will produce temporary and sub-optimum results.

This planning guide was designed for CEOs, sales executives, sales managers, sales representatives, human resource and training executives, and customer satisfaction/quality control managers. In other words, if you contribute in some way to the effectiveness of your organization’s sales force, you should use this guide. Also, remember that it is a precursor to your coursework, and completing it will give you a new understanding of your company that will bring the course, and your subsequent sales improvement, to life.

This document will assist you in planning the progression of your sales force to optimal effectiveness. Just as manufacturing and other business processes have improved through quality control efforts, engineering your sales process will improve the results of your selling efforts.

HOW THIS GUIDE CAN HELP YOU

This guide will help you assess your organization's sales processes and identify strategies and tactics that enable you to achieve new levels of improved performance. Using this guide, you can:

- Identify the activities that most affect your sales force's ability to profitably meet both your customer's needs and your own organizational goals.
- Rate your satisfaction with your organization's current efforts in these key activities.
- Develop a consensus about your sales organization's priorities.
- Formulate an action plan for improving your sales.

However strong the motivation to improve, an additional catalyst is almost always needed to turn that motivation into on-the-job energy and focus. This guide is exactly that, a tool for taking the critical first step—*setting priorities*—and an action plan for addressing them.

This guide helps you look at the things your *whole organization* can do to enhance sales effectiveness. What it *won't* give you is a prescription for addressing every dimension of your sales improvement undertaking. Stock answers won't work because each organization has unique challenges. The best solution is the one you'll create for yourself – and this guide will show you where to begin.

17 COMPONENTS OF SALES EFFECTIVENESS

For a sales force to operate at optimum levels, each facet of the sales process must be improved. This guide will show you how to inspect, adjust and establish controls to predictably and permanently refine the effectiveness of each of the following variables.

1. **Compensation.** Income must reflect the value of your salespeople while still motivating them to earn more.
2. **Sales Support.** Salespeople should sell and sell only.
3. **Sales Skills.** Skills must be up-to-date and appropriate for today's market.
4. **Product Knowledge.** Understanding and proactively applying the results delivered by your products and services is essential to improved sales.
5. **Sales Management.** It is not enough for sales managers to be good sellers. More importantly, they must have the skills required to manage people.
6. **Training.** The most effective training takes place often, and continuously.
7. **Marketing.** Sales and marketing must work as a team, providing opportunities to close in synch with the sales force's requirements.
8. **Strategic Plans.** These should be forecast according to the actual capabilities of the sales force, not from last year's results.
9. **Sales Tools.** No tool, technological or otherwise, will produce results if the sales process and organization are flawed.
10. **Recruiting.** Unsuccessful sales reps incur thousands of lost dollars. These mistakes are avoided by specialized screening of potential employees.
11. **Customer Retention.** The sales techniques for established customers are different from those used for prospects. A 5% reduction in customer attrition can boost profits by as much as 11%.
12. **Quality Issues.** Quality control throughout an entire organization frees up time for salespeople to do what they should be doing, generating revenue.

17 COMPONENTS OF SALES EFFECTIVENESS (CON'T)

13. **Communications.** Internal as well as out-of-office communications must be consistent, reflect the vision of your organization, and be appropriately routed.
14. **Industry Life Cycle and Impact on Sales.** As an industry moves from one phase to the next, skills, compensation, strategies, tactics and marketing must be adjusted.
15. **Product Life Cycles and Impact on Sales.** In the same way industry life cycles affect sales, product life cycles dictate the selling environment.
16. **Time Utilization.** Selling time is finite. Optimizing this time produces increased sales.
17. **Process Optimization.** The sales and marketing process is the only sustainable competitive advantage, and must be optimized to effectively communicate and reflect the value of your products and services.

UNDERSTANDING SALES EFFECTIVENESS

As you can see from looking at the 17 Components of Sales Success, there is no simple, universal approach to improving sales results. All of the components must work together in an optimized manner to make sales improvement efforts worthwhile and permanent.

Adjusting one and avoiding the others is one of the primary reasons traditional improvement efforts fail. When you understand the number of components and how they all work, both independently and together, it's easy to see why most people still use traditional sales improvement methods despite the proven failure rate.

Gone are the days of thinking that effectiveness could be measured simply, for example as x thousands of widgets for y hours of labor, or x dollars for y cold calls. Effectiveness—the relationship between *inputs* and *outputs*—has to incorporate a new definition of output. Output is not merely a revenue stream or an inventory of product, it's also customer satisfaction. For that reason, we have developed a new definition of sales effectiveness.

Sales effectiveness means achieving *maximum financial return* and *customer loyalty* from your sales efforts.

Well, it sounds good, but what does it mean? This definition acknowledges that sales effectiveness is a complex issue. To achieve it, you must balance:

- Bottom-line pressures against escalating customer expectations.
- Short-term gain against long-term advantage.
- Sales organization issues salespeople can easily control against company-wide issues they can't.

It's probably no surprise to you that trade-offs are the issue here. If, for example, you empower your sales force to negotiate price, terms, and conditions to improve customer satisfaction, will you sacrifice the predictability of your revenue stream and production schedules? And what about a customer satisfaction measurement system? Over time, you'd amass an invaluable database of information about your sales efforts, but will the ultimate payoff justify the development and start-up costs?

Faced with these kinds of trade-offs, executives need a framework for examining the complex issue of sales effectiveness. The forms in this guide will help you establish that framework.

STEPS TO SALES EFFECTIVENESS

Below you will find an overview of the steps you must take to achieve optimum sales effectiveness. As a Cargill training program participant, you will utilize all of these steps in some form or another. Reviewing and understanding them will help you guide your organization through the course of its improvement efforts.

The Pre-Planning Assessment Form beginning on page 9 asks you to analyze each of these steps as they pertain to your organization. You will then plan your sales organization's improvement according to these principles.

① Diagnostics

A sales force must be diagnosed from a process point of view. You must look at customer opinions (what they like and dislike about your offers), employee opinions, sales opinions, sales support functions and views, and many other factors. Far too often, the only diagnostics available to the sales organization are assessments of sales *results*, with no analysis of the activities that led to these results. This retroactive view of the sales force cannot provide management with information to change direction in the future. Optimally effective sales forces utilize an ongoing, activity/result-based self-evaluation system.

② Strategic & Tactical Planning

Without a written plan that correlates activity to results, it is impossible to assure success in achieving your financial goals. With it, success is nothing more than a matter of discipline. A sales force operating at optimal levels of effectiveness will utilize strategic and tactical plans to measure itself on a daily basis. These plans should all tie back into shortfall calculations, which function as the "translator" of daily activities into year-end financial results.

③ Business Development

Historically, this is an overlooked area of sales profitability improvement potential. The number one reason for lost sales is the salesperson's failure to be positioned in front of the prospect when that prospect is ready to buy. Missed opportunities occur when salespeople are prospecting or performing tasks other than selling. In other words, salespeople should sell and sell only. An optimally effective sales force has a dedicated business development function whose primary purpose is to identify all potential sales, then nurture these embryonic relationships until they are ready to become full grown leads or sales orders.

4 Process Optimization

The function of identifying, gaining, and retaining customers is very rarely managed from a *process* point of view. If you view selling as an activity that manufactures customers from raw materials (prospects), then you, like manufacturers who use quality control methods, will readily see the advantage of having documented processes. Without them, it is impossible to measure your sales activities. Without measurement, it is impossible to control a process. This is the only reason sales management continues to be frustrated with the inability of sales to produce consistent, predictable and profitable levels of revenue.

5 Personnel Optimization

Salespeople and sales managers frequently use self-taught skills, or skills learned in an *ad hoc* fashion. This method of folklore instruction has been used for decades. Unfortunately, in today's world, differentiation of products and services is becoming increasingly more difficult and buyers are increasingly savvy. It is therefore important for the sales force (managers included) to employ skills that directly complement the strategic and tactical plans of the organization. These skills must be tested and reinforced on an ongoing basis. Management must fully understand and work with the capabilities of their salespeople. A significant contributor to sales effectiveness problems is the misalignment of sales and management skills with the requirements of the marketplace.

6 Monitoring & Adjusting

A famous general once said: *"Don't expect that which you don't inspect."* We at Cargill Consulting Group, Inc. believe this philosophy of inspection is key to building a sales force that consistently and predictably generates profits. First, monitoring is useful only if the elements of the sales process have been previously benchmarked and documented. Furthermore, you must take into consideration the realities of your market and your organization's unique factors, and be able to adjust your sales improvement program accordingly, based on timely feedback from the field.

PRE-PLANNING ASSESSMENT GUIDELINES

To measure the effectiveness of your strategy and determine the action you need to take to improve, start by completing the Pre-Planning Assessment Form on the following pages. It is intended to be a preliminary guide to get you thinking about your sales processes.* You will get the “big picture” on your problem areas, and you will probably find hidden strengths on which to capitalize in the future.

We encourage you to distribute this assessment form to others whose job functions contribute to your sales force’s effectiveness. This includes human resources executives, customer satisfaction managers, quality control managers, and any other positions that affect your sales department’s productiveness. By involving others in the assessment process, you’ll build consensus for action planning as well as obtain other, valuable perspectives on your situation.

The Pre-Planning Assessment Form asks you to rate the activities within each of the six Steps to Sales Effectiveness. In thinking about your responses, ask yourself the following:

Degree of influence on your organization: Does this activity have a low, medium, or high influence on achieving peak effectiveness in your organization? Circle the number that corresponds to your evaluation of this activity’s impact on sales effectiveness.

Level of effort/resources: What level of effort/resources do you devote to the activity? Indicate whether your commitment is low, medium, or high by circling the appropriate number.

Degree of satisfaction: Are you satisfied with your progress on this activity? Indicate your level of satisfaction by circling low, medium or high.

When you are done evaluating each step, add and average the total scores for all three columns. Once you’ve completed the assessment form, you will interpret the results to begin the planning process.

**The Assessment is designed to identify priorities, generate discussion and serve as basis for action planning; it is not intended to be a formal measurement instrument.*

PRE-PLANNING ASSESSMENT FORM

STEP 1

DIAGNOSTICS

<i>Factors That Improve Sales</i>	Degree of influence on your organization			Level of effort/ resources devoted			Degree of satisfaction		
	Low	Medium	High	Low	Medium	High	Low	Medium	High
1. Accurately benchmarking current activities.	1	2	3	1	2	3	1	2	3
2. Correlating activities to year-end results.	1	2	3	1	2	3	1	2	3
3. Clearly understanding the sales team's activities.	1	2	3	1	2	3	1	2	3
4. Clearly understanding available selling time.	1	2	3	1	2	3	1	2	3
5. Differentiating between "order making" and "order taking."	1	2	3	1	2	3	1	2	3
6. Providing salespeople with monthly activity shortfall calculations.	1	2	3	1	2	3	1	2	3
7. Salespeople only performing tasks directly related to the sales cycle.	1	2	3	1	2	3	1	2	3
8. Clearly understanding reasons behind wins/losses/postponements.	1	2	3	1	2	3	1	2	3
9. Sales efforts going into qualified prospects only.	1	2	3	1	2	3	1	2	3

TOTAL _____ TOTAL _____ TOTAL _____

AVERAGE _____ AVERAGE _____ AVERAGE _____

STEP 2

STRATEGIC & TACTICAL PLANNING

<i>Factors That Improve Sales</i>	Degree of influence on your organization			Level of effort/ resources devoted			Degree of satisfaction		
	Low	Medium	High	Low	Medium	High	Low	Medium	High
1. Developing and internally communicating organizational mission and sales strategies.	1	2	3	1	2	3	1	2	3
2. Encouraging innovation (e.g. new products, new sales strategies).	1	2	3	1	2	3	1	2	3
3. Ensuring that products and services meet market needs.	1	2	3	1	2	3	1	2	3
4. Building long-term relationships with customers.	1	2	3	1	2	3	1	2	3
5. Ensuring effective customer service.	1	2	3	1	2	3	1	2	3
6. Implementing strategies to help customers fully evaluate products or services.	1	2	3	1	2	3	1	2	3
7. Opening new business within target organizations.	1	2	3	1	2	3	1	2	3
8. Implementing strategies to sell effectively against competition.	1	2	3	1	2	3	1	2	3
9. Choosing the right distribution channels.	1	2	3	1	2	3	1	2	3
10. Setting appropriate individual and group sales goals.	1	2	3	1	2	3	1	2	3
11. Communicating progress toward sales goals.	1	2	3	1	2	3	1	2	3

TOTAL _____ TOTAL _____ TOTAL _____

AVERAGE _____ AVERAGE _____ AVERAGE _____

STEP 3

BUSINESS DEVELOPMENT

<i>Factors That Improve Sales</i>	Degree of influence on your organization			Level of effort/ resources devoted			Degree of satisfaction		
	Low	Medium	High	Low	Medium	High	Low	Medium	High
1. Ensuring that sales staff is supplied with high quality, ready-to-buy leads.	1	2	3	1	2	3	1	2	3
2. Tracking leads through all inquiries to their conclusion.	1	2	3	1	2	3	1	2	3
3. Accomplishing business development without using sales time.	1	2	3	1	2	3	1	2	3
4. Comparing cost-effectiveness of all business development (prospecting) activities.	1	2	3	1	2	3	1	2	3
5. Quantitatively assessing marketing efforts.	1	2	3	1	2	3	1	2	3
6. Clearly understanding and measuring marketing return on investment.	1	2	3	1	2	3	1	2	3
7. Marketing department providing leads in synch with sales capabilities and corporate financial objectives.	1	2	3	1	2	3	1	2	3
8. Ensuring that the lead "pipeline" has no leaks.	1	2	3	1	2	3	1	2	3
9. Ensuring that lead flow avoids supply black-outs.	1	2	3	1	2	3	1	2	3

TOTAL _____ TOTAL _____ TOTAL _____

AVERAGE _____ AVERAGE _____ AVERAGE _____

STEP 4

PROCESS OPTIMIZATION

<i>Factors That Improve Sales</i>	Degree of influence on your organization			Level of effort/ resources devoted			Degree of satisfaction		
	Low	Medium	High	Low	Medium	High	Low	Medium	High
1. Promoting teamwork within the sales department.	1	2	3	1	2	3	1	2	3
2. Sales and other departments working together in a timely manner.	1	2	3	1	2	3	1	2	3
3. Maintaining positive recognition and image in the marketplace.	1	2	3	1	2	3	1	2	3
4. Providing effective advertising and promotion campaigns.	1	2	3	1	2	3	1	2	3
5. Instituting a process to assess and respond to customer feedback.	1	2	3	1	2	3	1	2	3
5. Ensuring that sales managers direct sales efforts that advance organizational strategies.	1	2	3	1	2	3	1	2	3
8. Ensuring that managers regularly coach and give feedback to salespeople.	1	2	3	1	2	3	1	2	3
9. Ensuring salespeople have comprehensive knowledge of their customers' business issues.	1	2	3	1	2	3	1	2	3
10. Equipping salespeople with high-tech tools (e.g., laptops, car phones).	1	2	3	1	2	3	1	2	3
10. Providing effective clerical support for the sales staff.	1	2	3	1	2	3	1	2	3
11. Providing recognition for outstanding sales performance.	1	2	3	1	2	3	1	2	3
12. Maintaining a high level of morale and job satisfaction among salespeople.	1	2	3	1	2	3	1	2	3
13. Allowing salespeople and managers to negotiate price, terms, and conditions within established guidelines.	1	2	3	1	2	3	1	2	3
14. Processing and delivering orders quickly and accurately.	1	2	3	1	2	3	1	2	3

TOTAL _____ TOTAL _____ TOTAL _____

AVERAGE _____ AVERAGE _____ AVERAGE _____

STEP 5

PERSONNEL OPTIMIZATION

<i>Factors That Improve Sales</i>	Degree of influence on your organization			Level of effort/resources devoted			Degree of satisfaction		
	Low	Medium	High	Low	Medium	High	Low	Medium	High
1. Deploying sales force in the most effective manner (e.g., geographically, by key account assignments).	1	2	3	1	2	3	1	2	3
2. Determining the proper number of sales reps and managers.	1	2	3	1	2	3	1	2	3
3. Determining the appropriate criteria for measuring sales force performance.	1	2	3	1	2	3	1	2	3
4. Controlling turnover among sales reps and sales managers.	1	2	3	1	2	3	1	2	3
6. Sourcing and hiring candidates with the appropriate background, skills, and personal attributes.	1	2	3	1	2	3	1	2	3
6. Determining and using appropriate hiring criteria for sales positions.	1	2	3	1	2	3	1	2	3
7. Ensuring that salespeople fully understand their roles, responsibilities and other expectations.	1	2	3	1	2	3	1	2	3
8. Ensuring that salespeople have and use strong selling skills.	1	2	3	1	2	3	1	2	3
9. Providing salespeople with in-depth product or service knowledge.	1	2	3	1	2	3	1	2	3
10. Providing salespeople with comprehensive knowledge of your competitors.	1	2	3	1	2	3	1	2	3
11. Bringing new people "up to speed" on policies, processes, responsibilities and expectations.	1	2	3	1	2	3	1	2	3
12. Dealing effectively with poor or marginal performers.	1	2	3	1	2	3	1	2	3

TOTAL _____ TOTAL _____ TOTAL _____

AVERAGE _____ AVERAGE _____ AVERAGE _____

STEP 6

MONITORING & ADJUSTING

<i>Factors That Improve Sales</i>	Degree of influence on your organization			Level of effort/ resources devoted			Degree of satisfaction		
	Low	Medium	High	Low	Medium	High	Low	Medium	High
1. Ensuring that sales management positions are filled quickly and appropriately.	1	2	3	1	2	3	1	2	3
2. Developing optimal pricing structures.	1	2	3	1	2	3	1	2	3
3. Implementing organization-wide sales tracking systems.	1	2	3	1	2	3	1	2	3
4. Forecasting sales accurately.	1	2	3	1	2	3	1	2	3
5. Controlling expenses within the sales department.	1	2	3	1	2	3	1	2	3
6. Providing compensation programs that support organizational strategies.	1	2	3	1	2	3	1	2	3
7. Providing comprehensive benefits programs (e.g., insurance, tuition, vacations).	1	2	3	1	2	3	1	2	3
8. Providing incentive programs that reward particular behaviors or results.	1	2	3	1	2	3	1	2	3

TOTAL _____ TOTAL _____ TOTAL _____

AVERAGE _____ AVERAGE _____ AVERAGE _____

PLANNING: IDENTIFYING CRITICAL ISSUES

The “Degree of influence on your organization” column in each step of the Pre-Planning Assessment Form will show you the issues of greatest importance to your sales organization. The information in the following chart will help you interpret your scores for these columns.

Average “Degree of influence” Score	Interpretation
High (2.5 - 3.0)	Steps with scores of 2.5 or greater have a high impact on the sales effectiveness of your organization. It is critical that you examine these steps because they will likely include strengths on which you’ll want to capitalize, as well as significant opportunities for gains.
Medium (2.0 - 2.49)	While it’s tempting to focus on the steps that received high and low scores, the ones with medium scores warrant attention too. Many of these activities deserve continued effort because they <i>do</i> affect your organization’s sales effectiveness.
Low (1.99 or below)	Steps with low scores indicate activities that are not as problematic. While not to be dismissed, these steps are of lower priority. Be sure not to overlook individual activities that received medium or high ratings for impact. Also, you may be devoting unnecessary resources to activities in this area that could be shifted to higher-scoring steps.

List each step in order of importance, starting with the one that held the highest “Degree of influence” scores on your assessment form.

1.	4.
2.	5.
3.	6.

Note: If all steps score about the same, list them above but consider giving them equal attention – perhaps focusing on a few key activities in each.

You should now have a big picture view that will give you a sense of direction. Whatever approach you choose, you’ll probably find it impossible to address *all* of the activities within one or more of the steps. For effective action planning, you must identify and prioritize specific activities on which to focus.

PLANNING: IDENTIFYING PATTERNS

There are many possible patterns to be found in each of the six steps—combinations of ratings for each of the three columns—but the patterns in the chart below identify the key activities for action planning. These are: *strengths*, *missed opportunities*, and *misdirected efforts*. Look for these patterns in each of the six steps of your Pre-Planning Assessment Form, beginning with the one you’ve identified (on the previous page) as deserving the most attention.

Improvement Priorities	Activity Ratings		
	Degree of influence	Effort/resources devoted	Satisfaction
Strength	high	high, medium or low	high
Missed Opportunity	high	high, medium or low	medium or low
Misdirected Effort	low	high	high, medium or low

As you are identifying patterns, record the activities that you classify as strengths, missed opportunities and misdirected efforts on the Priorities Form found on the following page.

Strengths are activities that received a “*high*” rating for impact and a “*high*” rating for satisfaction. They’re important to your organization’s sales effectiveness, and your efforts have paid off with satisfactory results. These are activities you’ll want to sustain and build on. Beware of diverting effort and resources away from them, unless you’re certain you’ll be able to maintain satisfactory results.

Missed Opportunities are activities that received a “*high*” rating for impact and a “*medium or low*” rating for satisfaction. These activities are important, but you’re not happy with the results. These high-impact activities deserve your attention because they have the potential to become strengths.

As you look at missed opportunities, question not only if you’re doing the right things, but also whether or not you’re doing them correctly. Is more effort needed – or a different kind of effort? Consider how such factors as people, processes, and materials play a role in your efforts.

Misdirected Efforts are activities that received a “*low*” rating for impact and a “*high*” rating for effort/resources. You’re dedicating a lot of effort and resources to these activities – but your investment isn’t warranted, given the activities’ low impact on your effectiveness. The resources invested in these activities represent hidden treasures. For a greater payback, apply them to a strength or missed opportunity.

As you consider misdirected efforts, examine why you’re devoting so much effort to these activities. What would be the consequences of doing less? What would happen if you didn’t do these activities at all?

PLANNING: PRIORITIES FORM

Step 1: Diagnostics

Strengths

1. _____
2. _____
3. _____
4. _____

Missed Opportunities

1. _____
2. _____
3. _____
4. _____

Misdirected Efforts

1. _____
2. _____
3. _____
4. _____

Step 2: Strategic and Tactical Planning

Strengths

1. _____
2. _____
3. _____
4. _____

Missed Opportunities

1. _____
2. _____
3. _____
4. _____

Misdirected Efforts

1. _____
2. _____
3. _____
4. _____

Step 3: Business Development

Strengths

1.

2.

3.

4.

Missed Opportunities

1.

2.

3.

4.

Misdirected Efforts

1.

2.

3.

4.

Step 4: Process Optimization

Strengths

1.

2.

3.

4.

Missed Opportunities

1.

2.

3.

4.

Misdirected Efforts

1.

2.

3.

4.

Step 5: Personnel Optimization

Strengths

1.

2.

3.

4.

Missed Opportunities

1.

2.

3.

4.

Misdirected Efforts

1.

2.

3.

4.

Step 6: Monitoring and Adjusting

Strengths

1.

2.

3.

4.

Missed Opportunities

1.

2.

3.

4.

Misdirected Efforts

1.

2.

3.

4.

SUMMARY

As we have mentioned, this Planning Guide for Sales Managers is intended to be just that, a guide. Because sales improvement can be complex, and the requirements of different industries and companies so diverse, you won't come away from this phase of your sales improvement undertaking with a standard answer that will rectify all your sales problems.

However, by now you should have your "big picture" on the obstacles suppressing your sales organization's effectiveness. By identifying your problems, you have taken the first step towards solving them.

You have learned that sales is an extremely complex and variable business function, with at least seventeen components that must work together to achieve optimal sales effectiveness. You have examined the six Steps to Sales Effectiveness and used the Pre-Planning Assessment Form to rate your organization's performance in each step. You have then used this information to pinpoint critical issues and patterns that affect your specific organization. In this way you have created your own customized sales improvement framework. With this critical preliminary work complete, you are now ready to put your plan into action.