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Sales Management Checklist

Leading a sales team is a complex pursuit with a simple objective: to meet and exceed the sales objectives for the area you're managing.

The variables that can impact your success as a leader are tremendous. Below is your sales management checklist. Its purpose is to help you stay on top of the primary issues that should have your attention on a regular basis... and to avoid letting the important success factors slip through the cracks. Your particular salesworld will likely involve a few more points or slight changes that are specific to you and your team/ company/ industry.

Consistently addressed, these are the sales management fundamentals that'll put you and your team in front of the pack ... and keep you there.

Sales Management Checklist

Your people

- General periodic discussion & review
- Goals & expectations understanding
- Sales skill training
- Motivation & inspiration
- Knowledge training (product/ service/ industry)
- Recruiting
- Promotions/ new roles/ new positions
- Performance reviews
- Recognition

Operational issues

- Activity numbers
- Sales numbers (revenue/ units/ margin)
- Sales process review
- Sales communication review & distribution
- Before- and after-the-sale review (processes)
- Lead generation
- Removing barriers from sales efforts

External relationships

- Top customer contact & review
- Top competitor review
- Top partner contact

Self-development

- Management skills
- Additional contributions

Your People

General periodic discussion & review

Meet with everyone on your team on a regular basis. This will help you stay current in terms of territory knowledge as well as with any new challenges your team (and ultimately you and your company) is facing. Also, a regularly scheduled discussion minimizes the stress associated with a sudden or unexpected manager/ rep discussion. If you rarely talk with your people and schedule a meeting, it probably won't be perceived as something that's going to be good.

Things to consider:

What's going on in the territory?

What's the competitive landscape?

New challenges?

Any ideas for process changes?

Goals & expectations understanding

Define and communicate (on a regular basis) all goals and performance expectations of your people and be sure to confirm their understanding of them. Leave nothing vague.

Things to consider:

Does my team know the specific sales/ production/ activity goal?

When will the goal change and what plan for communicating the goal is in place?

What might they misunderstand or find vague?

Sales skills training

Help your team become better at selling. Teach them how to ask thoughtful questions and listen better. Coach them on how to confidently handle your most common objections and confidently close a deal.

Don't assume they know how to do everything well. We all need reminders and ongoing reinforcement (including you). Address a different part of the sales process periodically with your people to help them stay in tune and grow. If you can't do it, outsource it to a trainer or training company.

Things to consider:

When did we last work to develop a specific sales skill? When can we do it again?

At what regular interval should we be formally working on our sales skills (as a team rather than in front of a prospect or customer)?

Motivation & inspiration

Part of your role as a manager is being a leader. This means you need to help your team stay motivated continually. An exciting compensation plan is one way to the heart, but your ongoing support and example are equally important.

Don't forget ... few professions have more rejection and challenges than sales. You're one person who needs to be in your team's corner. Encourage them personally and encourage their teammates to support each other at the same time.

Things to consider:

What did I last do to help inspire or motivate my team?

What and when do I plan on doing something next? At what regular interval?

What small thing could I do daily?

What's something I could do that's completely unexpected and exciting?

Knowledge training (product/ service/ industry)

Make sure your team stays sharp when it comes to knowing about your product/ service and industry. Do it for the obvious competitive advantage benefit but also for the benefit of your prospects and customers (no one enjoys working with half-hearted, unknowledgeable salespeople).

Consider holding periodic meetings for the sole purpose of learning something specific about what it is you sell, the industry, and the competition. Do it once or twice monthly and make the meetings 20 minutes or less to be sure everyone stays attentive. Consider standing meetings where no one sits. Choose a different person to run each one so everyone's involved (teaching encourages deeper understanding and commitment). Reinforce the discussions with a summary by email.

Things to consider:

What's new with our product/ service/ industry?

What are the most important things we should be reviewing?

Is my team up to speed?

How can I better involve my team in the process of educating themselves?



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Recruiting

People will leave (on their own or with your help), your company will expand, and people will be promoted or relocated. You need to be proactive in your efforts to know where you can quickly go to find good people.

Things to consider:

Who might I need to replace soon?

Who seems like they're not happy and may be leaving?

When will I next need to hire several people?

What events should I attend on a regular basis in order to find people for future openings?

Promotions/ new roles/ new positions

Some members of your team hope to reach the next level. Some hope to move into other areas and roles. Staying in front of the professional development goals of your team will help you with staff retention. Good people enjoy leaders who look out for their growth.

Things to consider:

Who on my team should I begin thinking about supporting in an effort to move into management?

Who on my team has expressed an interest in moving on to a different role?

What plans do I have in place for them?

Performance reviews

Feedback should be ongoing and frequent, but periodic formal reviews can help your team more deeply understand their individual value to the organization and the areas where they need improvement.

Things to consider:

When did I last conduct a formal performance review with those on my team?

On what regular schedule should I conduct performance reviews?

Is an annual review too long to wait? (Of course it's too long.)

In what areas should I focus the formal review?

Recognition

Recognition is a positive motivator. When your people exceed expectations or make outstanding contributions, you should recognize them as individuals as well as an inspiration for the team. Key dates such as birthdays and employment anniversaries should also be recognized when appropriate and if it's a part of your organization's culture.

Things to consider:

Over the last week/ month/ quarter/ year, what outstanding sales results or contributions should be recognized?

What should I do to recognize the effort and when should I do it?

What results or contributions can I forecast in the coming period that I can/ should prepare for now?

What birthdays and employment anniversaries are coming up in the next quarter? How should I recognize these events?

Operational issues

Activity numbers

Activity leads to sales. Monitoring and measuring activity trends can help maintain and improve sales results when the information is accurate. A sales pipeline report (and a regular review of it) can be very helpful in monitoring activity and forecasting results.

Things to consider:

What specific level of activity (phone calls, interviews, presentations) is necessary to hit our goals?

How and at what time interval should we measure it?

What's the acceptable dollar/ unit range for an adequate pipeline at any given time?

Sales numbers (revenue/ units/ margin)

The ultimate objective: sales (rarely overlooked ... by anyone).

Things to consider:

How do the sales results compare to forecast/ plan/ quota?

Sales process review

At a set interval, review your sales process and adjust it as necessary. Everything changes. Be sure your time and resources aren't allocated to activities that are no longer required or effective. "Because that's the way we've always done it," should never be the reason something is a part of your process.

Things to consider:

Is our sales process documented?

When was it last reviewed?

What can be eliminated in the process without it having an effect on results?

How can we improve the process?

Sales communication review & distribution

Your team communicates with many different people. Your regularly communicated sales messages (e.g., benefit statements, urgency statements, responses to top objections, email responses to inbound inquiries, closing statements) should be prepared, practiced, delivered, and reviewed on a regular basis if you want to assure a solid and professional sales approach to the market. Don't allow your team to wing it.

Things to consider:

What standard responses should we create and distribute?

Who can I involve in the process of creating the responses? Who can I have lead it?

When did I last review the sales messages we say and write?

At what regular interval should I review our regular communications?

Before- and after-the-sale review (processes)

Other departments can impact your sales results. An inbound sales inquiry might be handled by a receptionist. That inquiry may have been created by the marketing department. The product/ service you deliver or implement may be handled by another group.

Occasional and quick review of other areas will help you find things that may need to be improved or eliminated so sales can increase. It will also help you find things you can show appreciation for. When you find challenges or things that are going particularly well, communicate your ideas and praise to those in charge of the specific area.

Things to consider:

How is an inbound call handled?

What common challenges do our customers experience in terms of delivery or implementation?

What benefits are touted in our marketing materials?

Is our customer service department aware of the new ad campaign? Is our receptionist?

Lead generation

When business is challenging, no one overlooks lead generation. But, when business is good, creating qualified leads for the sales team can sometimes slip through the cracks.

To stay strong, keep a proactive eye on creating inbound interest in your product/ service regardless of the business environment.

Things to consider:

Who is handling lead generation?

What lead generation efforts do we have going at the moment?

What lead generation plans do we have for the next month/ quarter?

Removing barriers from sales efforts

Sometimes internal company issues or external competitive challenges can create barriers to increased sales. Identifying these barriers will come primarily from discussions with your people. The important thing is to remember to eliminate or minimize them where possible.

Things to consider:

What challenges have been reported to me recently that I still need to take care of?

What challenges do I see on the horizon internally? Externally?

Which challenges can I eliminate or minimize?

Managing external relationships

Top customer contact & review

Even if the 80/20 rule doesn't apply exactly to your sales world (80% of your business comes from 20% of your customers), there's probably a group of customers that are responsible for a larger part of your revenue than others. Be sure these people/ companies are regularly contacted by your company with something of value. It's likely a great deal of effort went into bringing in these people/ companies. Be sure you keep them.

Things to consider:

- How often should we contact our top customers?
- With what can we provide them that they'll find valuable?
- Who can/ should take responsibility for the effort?
- How well do I personally know what's going on with our top accounts?
- Are we prepared if we lose a salesperson who handles a top account?

Top competitor review

Formally review your top competitors on a regular basis. It will help you be sure you're in front of some of what they're doing and also help you assess whether or not you should have a competitive response – in the sales process or from a company standpoint.

Things to consider:

- Have any of our top competitors launched an additional competitive offering to what we sell?
- Are our top competitors hiring new salespeople? For what?
- Have our top competitors positioned any of their competitive offerings in a different way?
- What points are our top competitors using to differentiate against our offerings?
- At what regular interval do we formally review our top competitors? Who on the team could I involve?

Top partner contact

Contact your top partners on a regular basis to see how you might improve the relationship and learn about anything they may have on the horizon. Stronger relationships create stronger business.

Things to consider:

- At what regular interval should we contact our top partners?
- With what can we provide them that they'll find valuable?
- Who on my team can/ should take responsibility for this effort?

Managing your own development

Management skills

In the same way you should help your team improve, you should work on yourself. You, your company, and your team will thank you for it.

Things to consider:

When did I last get involved in a management development program?

At what regular interval can I commit to working on my management skills?

Who could I partner with to hold me accountable?

Who is my mentor? Who could be?

What topics should I address over the next 12 months?

How many books should I read monthly to help me improve?

Additional contributions

Much of your primary work as a manager will lead naturally to other contributions to the company that aren't your direct responsibility. These additional contributions (e.g., product/ service ideas, process improvement suggestions and assistance) will help you advance the goals of your organization and will also benefit your career.

Things to consider:

What additional organizational contributions outside my primary responsibilities have I made recently?

What additional contributions could I be working on now?

Now go lead someone.

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