ForceManagement®
WHERE STRATEGY MEETS EXECUTION

Leading Sales Transformation

A PRIMeR for Successful Adoption

White Paper

Sales Transformation

Supporting Successful Change

PRIORITY	RELEVANCE	INTEGRATION	MEASUREMENT	REINFORCEMENT

Looking down the barrel of a major sales transformation makes most sales leaders nervous about pulling the trigger, with good reason. The odds are stacked against you. When John Kotter published his book *Leading Change*, he revealed research showing that only 30% of change initiatives within organizations succeeded.

After the book's release, numerous studies and articles have attempted to address the elusive formula for adopting successful organizational change. Yet, a more recent McKinsey survey of 3,199 executives revealed the same startling results -- only one transformation in three succeeds.

So the question remains, "Why do so many change initiatives continue to fail miserably?" Even more importantly, "What can sales organizations do to shift the odds in their favor?"

First, it's important to understand that the prescription for lasting sales transformation comes in the form of a process, not an event. Sales transformation advances through many stages that build on one another. This process generally takes a commitment of many months, if not years to reach its ultimate level of maturity and impact.

Second, it's important to understand that successfully implementing change in your organization requires that every member of your sales team be equipped with building blocks that support behavior change and nurture successful adoption.

Four Key Components

1. Your Vision

Sales leadership must paint a compelling story which engages your sales team to see the point in change and agree with it.

2. Role Modeling

Sales leadership and managers should take actions that role model the desired change and mobilize other "influencers" to drive change deep into the organization.

3. Reinforcing Mechanisms

Systems, processes and incentives should be integrated to encourage and support new behaviors.

4. Skills and Capabilities

Each member of the sales team should be equipped with the skills and capabilities required to make the desired changes.

How and What to Change

Two Theoretical Perspectives

When preparing for change within your sales organization, it's valuable to consider several theories that speak to the influential factors that impact change in all organizations. There have generally been two contrasting assumptions that assert ways to effectively support successful adoption during organizational change.

Programmatic Change

The first theory, called Programmatic Change, asserts that you must first change the attitudes of individuals in order to change their individual behavior. Then the change in behavior, repeated by many people, will eventually result in organizational change.

Task Alignment

The second theory, Task Alignment, asserts that individual behavior is powerfully shaped by the organizational roles people play. Therefore, the way to change behavior is to put people into a new organizational context, which imposes new roles, responsibilities and relationships on them.

Comparing Assumptions About Change	
Programmatic Change	**Task Alignment**
Problems in behavior are a function of individual knowledge, attitudes and beliefs.	Individual knowledge, attitudes and beliefs are shaped by recurring patterns of behavioral interactions.
The primary target of renewal should be the content of attitudes and ideas; actual behavior should be secondary.	The primary target of renewal should be behavior; attitudes and ideas should be secondary.
Behavior can be isolated and changed individually.	Problems in behavior come from a circular pattern, but the effects of the organizational system on the individual are greater than those of the individual on the system.
The target for renewal should be at the individual level.	The target for renewal should be at the level of roles, responsibilities and relationships.

A Combined Approach

Over the years, there seems to have developed an artificial divide between the two theories, asserting that change is best encouraged by using one approach or the other. However, in our work with sales organizations around the globe, we find that a combined set of elements reflected in both models, actually yields the most reliable outcomes.

PRIMeR:
5 Disciplines of Successful Sales Adoption

Five integrated disciplines incorporate both the top-down and grassroots approaches evident in the previous models.

1. **Priority**
2. **Relevance**
3. **Integration**
4. **Measurement**
5. **Reinforcement**

Together, these disciplines form a powerful foundation for successful adoption of major sales initiatives.

1. PRIORITY

A successful transformation initiative begins with leadership determining that the change is necessary and good. Their involvement, and the perceived commitment to or lack thereof will set the tone for change and the adoption of new behaviors.

A critical success factor for change includes a commitment from leadership that this initiative is one of the critical-few, high-value sales activities prioritized for the sales organization.

Beginning at the design and development phase of the initiative, the leader establishes the priority by focusing on timely review and approval of deliverables and participating in the completion of key milestones. Active participation in training on new methodologies and full engagement in learning alongside sales teams are the clearest signal that your sales transformation is a priority. These actions gain buy-in from members of sales management and expand that buy-in throughout the sales organization.

Starting the day after the initial training event, priority should be sustained. The transformation priority is best manifested when leadership identifies and sustains focus on the primary factors influencing the initiative. The foundation for success is in place when the entire sales organization understands that the priority is achieving excellence in the new behaviors and celebrating the resulting successes.

PRIMeR:
5 Disciplines of Successful Sales Adoption

2. RELEVANCE

Throughout your sales transformation, different motivations are at play, and different actions will be required on the part of individuals and teams to successfully move through the phases of change. Make sure you understand and consider these key motivators within your organization.

- **Your Organization's Culture** - It's an unspoken voice in every organization—but one that speaks volumes, nevertheless. It can either encourage or hinder individual empowerment, which drives a person's capacity to take professional risks.

- **Your Organization's Leadership** - Smart employees pay attention to how leadership behaves. They are also pretty astute at predicting the attention span that leaders have for any particular adoption initiative. Leaders are responsible for embedding key concepts into the workplace and acting to ensure their placement is strong, consistent and secure.

- **Your Organization's Front-Line Management** – Sales managers have the ability to transform thinking and strategy into tactics and actions with sales reps who directly interface with your current and prospective customers. If sales managers aren't aligned with the new selling methods being developed, the odds diminish for a meaningful change to occur.

- **Your Organization's Sustained Level of Effort** - Adoption of new initiatives generally takes a year or more. A focused and sustained effort and the fostering of reasonable expectations is required to achieve organizational expertise and effectiveness.

Motivating employees and managers produces an *action engine* that is otherwise unavailable. Integrate relevance by engaging and expanding in the following ways to ensure that your *action engine* is aimed down the right path.

ENGAGE

Engage members in the design and development of the initiative and execution process. Being part of making decisions creates a greater sense of ownership and commitment to the outcome.

A famous behavioral experiment using lottery numbers makes this point. In the experiment, half the participants were randomly assigned lottery ticket numbers. The other half chose the lottery numbers. Just before the drawing for the winning numbers, researchers offered to buy back the tickets from their holders. The result? Those that were allowed to choose their own lottery ticket numbers asked to be paid almost five times more than those who were randomly assigned their numbers.

EXPAND

Make sure your transformation vision speaks to areas that impact employee's motivational triggers including community, family, customer, company, team and self. Attach outcomes of the initiative to as many of these impact areas as possible. After painting your vision, allow others to expand on it. Certainly, the story needs to be communicated, but much of the energy invested in communicating the story may be better spent listening to others and letting them add their perspectives. Empowering people to create and tell their own success stories creates a "relevancy multiplier." By allowing your change-related story to be shaped by others, you'll yield a greater return than you would have by creating the story for them.

During your sales transformation, expect changes. Motives may change. Conditions may change. Therefore; relevance will change. Refreshing your concepts and adapting to changes within your environment will help you maintain relevance throughout your initiative.

PRIMeR:
5 Disciplines of Successful Sales Adoption

3. INTEGRATION

Integration is crucial in four respects:

1. Within the lives of individuals executing the sales program
2. Through a holistic view of the disciplines required to successfully execute work
3. With processes, tools and technology supporting execution of the work
4. Across, between and within organizations

Integration will be necessary for blending in new required roles and responsibilities to support needed changes in the organization. Ensure your tools and processes are sales consumable and don't put an undue administrative burden on your sales managers and teams. Sales reps need to see your transformation process and tools as a mechanism for enhancing productivity instead of an additional administrative task to support the change. A holistic and well-integrated approach to key sales disciplines steer your team's performance. Integration within and among these key disciplines will drive critical success.

Your Sales Talent	Your Sales Plan
It's important to give managers the ability to pinpoint the desired characteristics and performance potential of each player on their teams. By defining what success looks like in a sales role at your company and integrating that definition into a profile for success, you can identify the DNA of your perfect sellers. This will give you the talent pool you need to excel in implementing your sales plan.	Your sales planning process ultimately drives your sellers to the right opportunities. How your sales organization operates, your management operating rhythm, is fueled by an integrated set of processes and tools that provide a clear line of sight into your sales operations.
Your Sales Execution	**Your Sales Messaging**
Your approach to sales execution should be integrated to leverage your plan. In addition to integrating your own sales disciplines, consider integration with your customers by aligning your sales process with the buying process. Sales execution is also bolstered by a common sales language used consistently by the sales force. This creates a platform to leverage key sales messages in the customer conversation.	The language you speak face-to-face with a customer must focus first on uncovering customer needs, then on articulating your value. Best-in-class companies develop a sales messaging framework to help sellers integrate key messages into the sales conversation.

Integration involves supporting related organizations such as marketing, product development, customer support and technology, as well as the extended organizations of alliances, channels and partners. Alignment with and active engagement by these organizations provides leverage and reinforcement for change.

PRIMeR:
## 5 Disciplines of Successful Sales Adoption

MEASUREMENT

Behavioral and business measurements are each integral to your initiative. When done well, these measurements provide key performance indicators of adoption success, providing insight into progress and challenges. A qualitative assessment will help gauge the fluency of desired behaviors throughout your sales transformation process. It's important to begin with a historical perspective.

Assessing Your History

As you consider your team's readiness for sales transformation, it's helpful to identify what you think your team's main challenges will be during the process, and then develop a plan to address them. It may not be pleasant, but it's necessary to acknowledge any "skeletons in your closet" that may be associated with lackluster results from previous change initiatives. Assessing the answers to these tough questions early in the process will help you identify conflicts and set priorities:

- How successful were past sales enablement projects?
- Why were some more successful than others?
- How do recent organizational changes align with this project?
- How do recent executive changes align with this project?
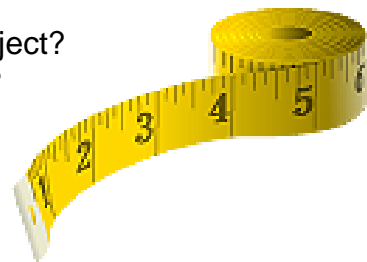
Assessing Your Priorities

As a leader, you'll make assumptions about who should lead the change effort, what needs to be changed and how it's going to be done. If your organization has competing priorities, none of those assumptions will be correct. It's critical to take time to assess where this initiative stands on the list of other organizational priorities.

- What are your critical few corporate priorities?
- What is the priority of this project compared to other corporate initiatives?
- If it's a million dollar baby – Whose baby is it?
- What other sales enablement initiatives will be competing for this project's critical resources?

Assessing the Ongoing Process

The better the adoption plan is executed, the greater its effect on sales growth. From the word "go," team members must understand the desired behaviors expected of them and be given the tools and training to facilitate change. Examine these elements to determine if the team has the ammunition they need:

- How engaged are senior leaders in the major project events?

- What are the success metrics that will be measured and reported to support adoption?

- What is the plan for owning, adopting and sustaining the deliverables from the project?

- How is the project being communicated to those it will impact?

Assessing a Successful Execution

Once trained, hands-on experience, trial and error, and success and failure will eventually lead your sales organization to a place of operational fluency and adaptation. You should begin to see most of your sales team experience a productive use of the new methodologies. Champions and mentors should surface during this phase and help continue the momentum.

Assess the following questions to determine how your adoption efforts are progressing.

- How well are managers reinforcing (inspecting and coaching) the processes?

- How are success stories being gathered, documented, communicated and rewarded?

- How are the project success metrics being tracked and reported?

- How has the initiative adapted to challenges exposed in assessments?

5. REINFORCEMENT

Reinforcing new behaviors in each individual requires that you understand the impact that your sales transformation is having on members of your team and that you look at that impact through two very distinct lenses. The first lens allows you to gauge an individual's **ability** to apply the new concepts of change. The second lens allows you to gauge an individual's **willingness** to apply the new behaviors. These two lenses can be compared in what is called the Skill/Will Model.

The Skill/Will Model is comprised of four levels -- defined by a Y-axis of Skill and an X-axis of Will. "Skill" is an individual's ability to apply the concepts. "Will" is the individual's motivation to apply the concepts.

- **Level I** represents someone with Low Skill and Low Will

- **Level II** represents those with High Skill but Low Will

- **Level III** represents those with Low Skill but High Will

- **Level IV** represents those with High Skill and High Will
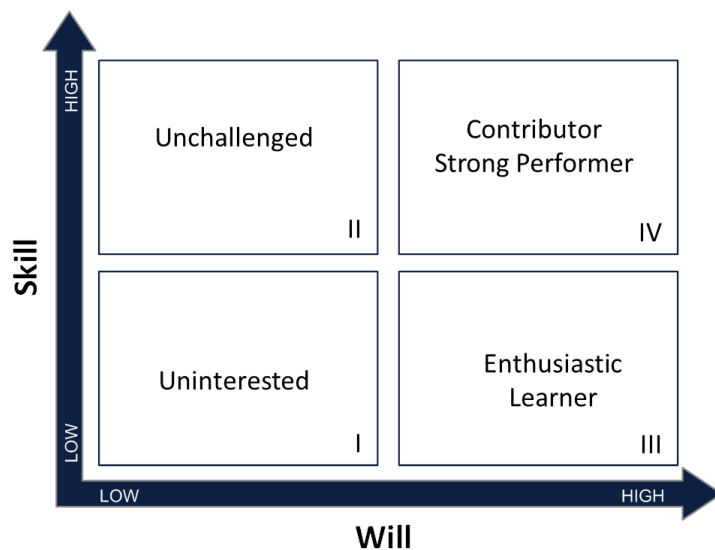
A common mistake many organizations make is to treat all team members the same during a sales transformation. Different motivations are at play and different actions will be required on the part of individuals and teams to successfully move through the sales transformation.

Fortunately, a major sales initiative presents a perfect opportunity to coach and develop your team. Once you understand where each team member is on the Skill/Will Model, your next step is to coach the team accordingly.

PRIMeR:
Four Key Steps for an Effective Coaching Model

Four key steps are required in an effective coaching model

1. Tell
2. Show
3. Observe
4. Feedback

Tell - The Gallup Organization® conducted a large research study to determine what the most talented employees need from their workplace. At the top of the list was "knowing what's expected of me at work." Setting clear expectations, especially in a time of change, is fundamental to maintaining high performance. In coaching, make sure you clearly explain what new behaviors you'll be expecting.

Show - Demonstrating the skills you want your sales team to adopt throughout the transition will encourage new behaviors and skill development. Show your team how to do what you told them to do. Lead by example and model the behaviors that you're asking them to adopt.

Observe - Many managers often struggle with the concept of effectively observing the performance of their team members. Yet, observing is a critical step throughout the learning process. Great observational managers usually categorize their observations and discussions with their sales team in this way:

- Behaviors that need to be praised, recognized and encouraged
- Behaviors that need to be started or "added to" because something is missing
- Behaviors that need to be changed or improved
- Behaviors that are wrong and need to be stopped

Feedback - The final step is to provide feedback on how well the performance you observed aligns with the expectations you set and the behaviors you demonstrated. Focus front-line leaders on inspecting, coaching, remediating and mentoring. Embed behavioral checklists into review sessions to aid successful adoption among sales managers and reps. Pursue good coaching opportunities and you'll advance changes in behavior.

PRIMeR:

5 Disciplines of Successful Sales Adoption

ADOPTION BEST PRACTICES

Five key principles and best practices consistently stand out as critical success factors for best-in-class companies leading high-impact sales initiatives. Leaders who follow this specific set of best practices help develop a self-reinforcing cycle of commitment, coordination and competence. Skipping steps only creates the illusion of speed but never produces satisfying results.

1. Priority:
Leaders identify the initiative as critical to the organization, stay fully engaged in learning alongside their teams and consistently sustain focus on the primary factors influencing success.

2. Relevance:
Leaders engage employees in the design, development and execution of the initiative and empower each employee to create and share their stories of success.

3. Integration:
Leaders ensure that changes are integrated and are permeating 1) mindsets, beliefs and perspectives, 2) roles and responsibilities 3) key sales disciplines and 4) supporting organizations.

4. Measurement:
Leaders define both qualitative and quantitative measures and ensure they are assessed and trended throughout the initiative.

5. Reinforcement:
Leaders gauge adoption by assessing the skill and will of each employee, then using effective coaching to tell, show, observe and provide feedback.

P	**R**	**I**	**M**	**R**
PRIORITY	RELEVANCE	INTEGRATION	MEASUREMENT	REINFORCEMENT

PRIMeR:

5 Disciplines of Successful Sales Adoption

SUSTAINING ADOPTION SUCCESS

The purpose of change is to create an asset that did not exist before. Without an aptitude for adoption, a sales transformation effort can easily dissolve into a list of confusing and incompatible projects taking the organization in the wrong direction, or nowhere at all. It's a long-range target, but success is attainable and desirable. Creating a long-term capacity for adoption success requires a new level of understanding, planning and persistence. Leaders who know the way, go the way and show the way ultimately experience transformative success.

About Force Management

Force Management offers customized sales consulting and training services, designed to help customers increase their sales revenue, and improve their sales margins and market share. Through innovative programs, proven evaluation tools, and customized training solutions, Force Management helps B2B leaders maximize their sales organization's profitability and productivity. Staffed by seasoned professionals with real-world experience in sales, sales operations and marketing, Force Management works with clients to solve critical business problems through strategy and execution of high-impact, comprehensive solutions that are highly differentiated in the marketplace and that consistently achieve measurable sales results.

Force Management's Key Areas of Focus Include:

- **Messaging** – How well your sales team articulates your value and differentiation to be able to charge a premium

- **Sales Execution** – How well your team aligns its selling activities with the customers buying process to more effectively qualify and manage opportunities

- **Sales Planning** – How well your sales managers follow a cadence around the critical sales planning efforts from territory management to forecasting to coaching their sales teams

- **Talent Management** – How well your sales managers follow an operating rhythm for recruiting, developing and coaching sales talent based on the key success behaviors required to excel in their jobs

- **Adoption** – How well your team is reinforcing and measuring the key concepts of your sales transformation.

1 Harvard Business Review, Why Change Programs Don't Produce Change, 1990
2 Max Landsberg, *The Tao of Coaching*, 1996, Harper Collins
McKinsey&Company, The Irrational Side of Change Management, Creating Organizational Transformations
John C. Maxwell, author

Are you ready to create true sales transformation in your organization?

With sales coaching tools focused on measurement and reinforcement, we've helped sales teams around the world create lasting and measurable success.

You can get there, too.

GET STARTED ➡

For more information:

f 🐦 in 🔊