



THE SALES LEADER'S GUIDE TO GREATER SALES EFFECTIVENESS

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In the last two decades, the sales force has come under the same intense functional scrutiny that befell marketing, operations, and manufacturing in the decades before. Prompted by the implementation of CRM and other enabling technologies, the sales force is now being measured, managed, and massaged in ways that were completely unimaginable when many of us began our careers not too long ago. With the intensified focus on sales force discipline, sales leaders have been forced to become much more proactive in their approach to sales management.

No longer are senior executives content to simply hire legions of ‘natural born’ salespeople, design a rich incentive plan, and set their sellers free to scour the earth for customers. Sales leadership is now a game of finesse where careful analysis and planning is required. And once the game begins, continuous coordination and course-correction is the expectation. There are many moving parts, and the stakes are increasingly high. Stated bluntly, sales leadership in the 21st century is harder than it was before.

How do you excel as a sales leader in this challenging new environment? What are the right questions to ask, and where do you find the answers? Which management practices will enable your team to outmaneuver and

outsell the competition? How do you maximize your opportunities while minimizing your risks? In other words, how do you win the game?

In our experience, success or failure in sales comes down to better execution in the field. We find that most companies are good at planning their go-to-market strategies, but they fail to consistently execute those plans once they transition to the field. To help address this shortfall, we have assembled in this e-book the insights of several thought leaders on CRM, training, process, pipelines, forecasts, and other execution-related topics. As we have seen time and again with our clients, it is the command of these issues that leads to victory.

Of course, these are multi-faceted issues that demand more discussion than we can provide in this document. If you want to learn more about our research into the latest sales management best practices, [please visit our website](#) or [contact us](#) directly to schedule a conversation. We are sales management experts, and we love to share our experiences. But until we get the opportunity to chat in person, we hope you enjoy the e-book!

The Vantage Point Team



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3 Reasons Sales Leaders Keep or Lose Their Jobs

By Jason Jordan

As a sales leader, you live in the line of fire. You're the person who's ultimately accountable for the success of your sales force, and there are no acceptable excuses for failure. When you hit your number, things are good; when you miss your number, things are bad. So if you want to live to see another budgeting cycle, the question is this: What can you do *today* to ensure your success *tomorrow*?

In Vantage Point's experience, there are three things sales leaders need to do to make sure the bullets keep whizzing harmlessly by their heads quarter after quarter—three key tasks that portend success and a long career. You will survive and flourish as a sales leader but only if you can drive excellence in the areas of *pipeline management*, *sales coaching*, and *sales forecasting*.

The fact that these three areas are important is no surprise—they're probably topics of daily conversation within your organizations. But we find they are often overlooked as key drivers of performance. They're more likely considered

to be basic expectations that neither excite nor offend. You have a pipeline, sure. You've got a coaching methodology, check. You do forecasts, no doubt. So what?

The "so what" is that in order to keep hitting higher and higher revenue targets, you need to keep getting better and better at these activities. Without better coaching, you won't build healthier pipelines. Without healthier pipelines, you won't hit your growing forecasts. Unless you hit your forecasts, you won't keep your job. Yeah, it's that simple.

This is why Vantage Point is committed to identifying innovative practices that elevate pipeline management, sales coaching, and forecasting. And more practically, this is why our [three core training programs](#) address these three core tasks. Vantage Point's mission is to make sales management better, so let us share some insights that we've gained during our time studying these critical success factors.

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Sales leaders will survive and flourish if they drive excellence in the areas of pipeline management, sales coaching, and sales forecasting.”

Pipeline Management

Companies that are effective at pipeline management grow revenue 15% faster than those that are ineffective. ¹

Of the three areas we mentioned, pipeline management is probably the most important. Your sales pipeline consists of all the “live” opportunities your team is currently pursuing—it is effectively your company’s lifeline. These are the deals that you will either win or lose, and they will be booked as either your future revenue or else that of your competitors. Manage your pipeline well, and you will grow faster. Manage your pipeline poorly, and your competitors will drive you out of the market.

In essence, great pipeline management comes down to getting the right deals in, getting the bad deals out, and winning the deals you choose to pursue. To do this, you must first know your ideal customer profile in terms of profitability, growth potential, or any other measure that’s key to your organization’s long-term health. Then you must know why those customers would choose to buy from you over your competitors. Once you have a pipeline full of the right prospects and a strategy to beat the competition, you’re destined to succeed. You will only fail if your team doesn’t execute your plan consistently... Which leads us to the topic of coaching.

Sales Coaching

18% more reps make quota under sales managers who demonstrate effective coaching behaviors. ²

Great sales coaching is the most direct path to great sales execution. Most executives know this, and set organization-wide expectations that their managers proactively coach their sellers. However, coaching is the most important job responsibility for which managers are not held accountable. There’s a huge disconnect here. Leaders will say that coaching is mandatory, but then they won’t bother to measure it. We’ve seen thousands of sales management reports and dashboards, and very few of them had metrics on sales coaching, despite its acknowledged impact on performance. Why is that?

The reality is that coaching is the one activity in most sales forces that doesn’t have to get done. It’s a discretionary task that comes right behind everything else—firefighting, reporting, hiring, firing, mediating, meditating, eating, sleeping—seriously, everything. It is the classic blunder of focusing on the urgent over the important. If you want a sales force that consistently succeeds and continually improves, your priorities probably need to change. Coaching has to become the most

urgent thing in your sales managers' worlds, and you need to hold them accountable for it. Just as you hold them accountable for...

Sales Forecasting

*Companies that are more effective at forecasting are 31% more likely to hit revenue targets than those that are ineffective at forecasting.*³

Let me blunt: We think sales forecasting is the least important of these three topics. I know, I know... It feels like the most important, because the forecasts go to the CEO, who provides them to the Board of Directors, which shares them with Wall Street analysts, who make recommendations that influence stock prices and shareholder value. That's a big deal.

The problem is, while getting your sales forecast accurate is important, it doesn't necessarily improve your sales performance—it just alerts others to what you suspect is going to happen. Your sales force will close a certain amount of business this quarter regardless of whether the forecast is high, low, or right on target. Yes, companies that are more effective at forecasting are 31% more likely to hit revenue targets, but it's a piece of circular logic. You adjust your expectations to fit your performance, which affects your expectations.

Yet the act of forecasting can be helpful; that's why it makes our list of the three things sales leaders absolutely have to get right. Interestingly, sales forecasts can be quite powerful when they're used as inputs to the other two activities. Forecasts can inform where the pipeline needs bolstering or where the sales force needs coaching. And that's an even bigger deal. When these three components work in concert, they're an incredibly potent trio indeed. Each feeds the others in a virtuous circle of performance improvement that leads to better all-around outcomes.

So if you're a sales leader who likes your job, we'd advise you to pay very close attention to your sales pipeline, your sales coaching, and your sales forecasting—in that order. When your pipeline is healthy and coaching gets done, your forecasts look better and your performance improves continuously. As a sales leader, you will always be in the line of fire. But when these three allies conspire to defend you, you'll be much less concerned about the bullets whizzing by. They won't hit you, because you'll always hit your number. Life will be good.

References

¹ Vantage Point / Sales Management Association Pipeline Management Study

² Vantage Point Sales Management Practices Survey

³ Vantage Point / Sales Management Association Sales Forecasting Study



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Sales Management: Creating An Effective Management Rhythm

By Michelle Vazzana

Every sales manager has a rhythm to the way they work. The question isn't whether you have one (you do); it's whether the rhythm you have is effective.

When we talk about management rhythm, we are referring to the cadence of your calendar—the pattern you have established for conversations with reps, coaching time, production of reports, meetings and so on. On the surface, it may sound like one of those new-age concepts that is only vaguely relevant to the hyper-busy reality of the sales manager's day. In fact, your rhythm matters deeply. In Vantage Point's comprehensive study of global sales management best practices, we discovered that management rhythm is a huge differentiating factor between successful and unsuccessful managers.

Formal vs. Spur-of-the-Moment Sales Management

Here's the key differentiator: Successful managers have established a level of formality

to their rhythm, while unsuccessful managers tend to operate without formality and in a more ad hoc manner.

By "formal," I mean that critical conversations and activities are scheduled in advance, are repeated on a regular basis, have specific agendas, require preparation and input by both manager and seller, and have very defined outputs. Yes, there are some types of interactions that will always appear on a sales manager's calendar, such as pipeline reviews, forecasts and field travel. But these aren't the conversations I'm talking about. Pipeline reviews and forecast meetings, for example, tend to have little impact on the success of the individual seller. The top 25% of managers go beyond this baseline and formalize interactions around topics that have enormous impact on sales rep performance, including account strategy, opportunity management and territory management.

The bottom 75% percent of managers (as measured by revenue target achievement)

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Management rhythm is a huge differentiator between successful and unsuccessful managers. Top managers meet with their sellers less frequently than managers who run things ad hoc, but spend more time in well prepared discussions.”

leave these crucial conversations to chance by conducting them primarily when a seller or manager approach each other to discuss an issue or crisis. Many managers think these spur-of-the-moment interactions work well because there is a feeling of progress in solving an immediate problem. But it's entirely reactive, and the conversations tend to be brief, superficial and very directive. There is little coaching or in-depth discussion, which are the keys to long-term improvement in a seller's performance.

When I stress the importance of formalizing the most vital conversations (usually around account, opportunity or territory management), overloaded managers tell me they don't have time for that. But they do. As it turns out, top managers who schedule critical conversations meet with their sellers less frequently than managers who run things ad hoc. Top managers just spend more time in each meeting. And, because meetings have been scheduled in advance, both the manager and seller come prepared for the discussion. This combination of preparation and focused time enables deeper and more productive discussions that create better outcomes.

Avoid Over-Engineering

Another objection I often hear to creating a more formalized management rhythm is: “I

tried that and it didn't work.” In those cases, I often find the manager so over-engineered his plan that it wasn't realistic in the real world. One sales leader I worked with created a detailed operating plan that included 10 different types of meetings, each with incredibly detailed agendas and templates. He demanded that each sales manager sign a statement ensuring adherence to the plan. When his sales managers failed to comply (because it was realistically impossible), he decided this rhythm stuff didn't work. Like many sales leaders, he believed that the only way to save his people from managing by reacting was to ensure that their time was completely structured. That never works: Success lies in a balance of informal and formal interactions.

Since sales managers have control over only about one-third of their time (Adam Rapp, Ohio University) they need to ask themselves: What conversations and interactions are most vital to the success of my reps and will have the most impact on their performance? Schedule those interactions. Allow other less crucial conversations to occur on an ad hoc basis. When the sales leader with the over-engineered operating plan changed his approach, he helped his managers create an effective management rhythm that led to significant improvement in their team's performance.



Keep it Simple and Focused

In addition to over-engineering rhythms, another failure point I often see is planning too many items for a single meeting. I once saw a manager schedule 15 items for a 30-minute meeting. That's too much! It doesn't allow for the in-depth discussions that are so critical to coaching. "More" does not equal "better." For real results, plan to talk about fewer topics in-depth.

Finally, use the minimum amount of rigor necessary to accomplish the goal successfully. If meeting once a quarter is sufficient, don't try to meet once a month—you'll fail. If you only need to meet once a month to talk about a topic, don't meet once a week—you'll fail. Don't set the bar high; set it low and achievable.

So what's the bottom line? Planned interactions lead to deeper, more valuable discussions that create better results. Managers who establish the right rhythm for these interactions not only experience an improvement in team performance, they also find they are less stressed, less prone to manage reactively, and are more likely to be counted among the elite top quartile of sales managers.



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Three Competencies Vital for Sales Managers

By Bob Kelly

The job of the sales person is dramatically different than it was just a few years ago.

In response to the disruptive impact of technology and the shifting behavior of buyers, firms are re-thinking both how their salespeople work and how they interact with their customers. These changes have occurred with no shortage of commentary from management pundits and other interested observers.

Far less attention has been paid to the equally profound changes to the sales management role, even though this job has an outsized impact on corporate results. Firms focused on sales effectiveness must recognize the emerging sales manager competencies that are radically reconstituting managers' value in the modern sales organization. They are far different than the competencies required of managers hired a generation ago.

For example, oversight and supervisory functions that once consumed first-line managers' time are now easily automated. Rich data on seller activity—calls, proposals, customer visits, email, even social media interactions—can be measured and assembled with little human intervention. Where once managers spent a lot of time compiling data and assembling reports to divine salesperson performance, analytics applications now greatly reduce this burden, giving managers timely access to performance—often within arm's-reach on a mobile device. Many large sales forces automate call reporting using GPS-enabled tracking in field sales representatives' cars. Many firms also track customers' email and web interactions, inferring in real time where along the buyer's journey a prospect is likely to be. All this means that managers no longer need to ask, "Are my salespeople doing what I've asked?" and instead can consider, "Am I asking my salespeople to do the right things?"

Automating lower-value supervisory, administrative and accountability functions expands managers' capacity to influence more strategic outcomes. In doing so, successful sales managers draw upon emerging, strategic managerial competencies. These competencies are focused on diagnostic skills, change implementation and expansion of individual reps' sales capacity. Firms that recognize this shift and train their managers accordingly will see a measurable impact on performance.

So where should you focus your sales manager training? As I see it, there are three main competencies that sales managers must possess to lead teams effectively today:

1. Change Management. Sales organizations are evolving at a staggering rate. We are seeing large sales organizations undergo a comprehensive reorganization roughly every three years—an unprecedented level of transformation that can only happen if the front-line sales manager is highly competent in all aspects of change management. Sales managers must simultaneously be keenly aware of when change is required in a selling approach or messaging, grasp how their sales teams should respond, persuade the people they manage to do things differently, and oversee implementation of change over the

long haul. In addition to a deep understanding of change management principles, this requires strong leadership skills


2. Issue Diagnosis and/or Process

Discipline. Sales organizations make hundreds of decisions around going to market and engaging buyers. Great sales managers are always looking at customer engagement to figure out what is and isn't working, and exercising judgment on when and how to adjust. They do this by thinking like executives. For example, today's successful sales managers know how to consider all the work their team is assigned to do and, like a CIO, determine how to free up time cost-effectively and reallocate that time toward more valuable work. Great sales managers also think like an HR leader, constantly evaluating whether they have the right talent in the right places and how that talent should be developed. At the same time, they think like CFOs, knowing there's a number to make and everything rides on making it. Every sales organization asks their people to do more than they can reasonably do; sales managers must constantly look for places to find efficiency, or team performance will suffer.

3. Team Member Development. Managers have always had some responsibility for developing people, but the pace is faster today

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Three emerging sales manager competencies are radically reconstituting managers' value in the modern sales organization. They are far different than the competencies required of managers hired a generation ago. ”



and there's more pressure on managers to bring salespeople along. "Coaching" is often used to describe this competency, although that's not all of it. Development also touches on the attractiveness of a company as a workplace. The trend over time has been to divest employee development, in part due to the mobility of workers. With talented employees able to switch jobs more easily than ever, firms are more reluctant to invest in training and development—at a time when training and development has never been more critical. The best-performing sales managers make sure their salespeople are smart in all the areas that matter for success. They coach the talent they are given and get more out of the people who are assigned to them than their mediocre counterparts. Finally, the best managers not only coach their people for success today, they keep an eye toward the long-term growth and development of everyone on their team, which improves both retention and long-term performance.

Do your sales managers possess these three competencies? For most organizations, the answer is no, because the way in which managers are hired and trained has not yet caught up with the reality of what's now required from them. Despite the outsized impact sales managers have on results, we still see most firms approaching sales

management in the same way they always have—by promoting top-performing reps into open managerial spots and assuming their success as a rep will lead naturally to success as a manager. This doesn't work. The skills required for seller and manager are starkly different—and the gap between those skill sets has never been wider than it is today.

Here's the good news: companies that invest in training their sales managers on the new competencies for success can gain immeasurable advantage. This doesn't mean spending more money—it means reallocating dollars from training salespeople to training sales managers. Our research shows there is a low return on investment from training sales people, but investing in manager development—particularly in developing the competencies described above—is one of the most powerful places a company can put its training dollars.

The front-line sales manager, more than any other management position, has the greatest near-term impact on company performance. When you bring your sales managers up to speed on the competencies they need to be world-class managers, you maximize your organization's chances of turning in world-class results.



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Trish Derman is Vice President of Client Services for Vantage Point. Trish specializes in orchestrating resources to manage the design, development, delivery, and impact evaluation of customized training engagements for clients.

How Will You Make Training Stick?

By Trish Derman

“How will you make training stick?”

As experts in sales management training, we get that question a lot at Vantage Point. Sometimes it’s worded a little differently. *How will we make training stick? Or, How will we make training sustainable? Or, How will we reinforce the learning?* No matter how the question is phrased, though, the underlying assumption is the same: Sales trainers are responsible for ensuring their training is reinforced and applied, so that their customers can realize its benefits.

At first glance, this assumption seems reasonable. If an organization pays for sales management training, it is expected that the training will make an impact on performance. And to make an impact on performance, the training must be applied. The expectation is that the training partner—who is being paid for this anticipated performance improvement—should ensure application occurs. But holding the trainer responsible for a sales manager’s

regular use of training is like holding a teacher solely accountable for a student doing his homework every night. It’s not the teacher who has influence over what happens at home; it’s the parents. In this analogy, success requires a shared effort between the parents, student, and teacher.

The same dynamic applies in the workplace. The sustainability of sales management training is a joint venture between the training organization, the sales managers who attend the training, and their senior leaders. Just as teachers can’t be held solely accountable for a student applying what he learns, neither can the training partner. Similarly, sales leaders bear the ultimate responsibility for sales managers’ use of the training received to improve performance.

Sure, a training partner can help by providing support material, follow-up, and other aids to reinforcement. But like classroom teachers, external trainers have no real influence or

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To ensure the benefits of sales management training are realized over the long haul, direct supervisors must continually emphasize it. This means senior sales leaders must own long-term sustainment. ”

authority over the folks they've trained once their engagement is complete. Without internal reinforcement of the material, sales managers will gradually slip back into their comfortable pre-training routines. That's simply human nature. To counteract this natural tendency and ensure the benefits of training are realized over the long haul, direct supervisors must continually emphasize it. For sales management training, this means senior sales leaders must own long-term sustainment.

Most sales leaders understand this intuitively. But they still ask us how we will make training stick for a couple of reasons. First, most senior leaders' plates are already jam-packed with

responsibilities, and it is a lot more appealing to push accountability for training success onto the training partner rather than try to pile it onto an overflowing plate. Second, since training typically isn't always viewed as a change management initiative (which it is), companies often don't apply change management principles to it, relying instead on the training itself to produce change. But in order to be truly effective, training does need some change management elements. It needs a senior champion—someone at the top of the sales hierarchy who visibly supports the training initiative. Post training, managers must also be held accountable for doing things differently—ideally, by sales leaders in the direct line of command above those being trained. Otherwise, training won't stick no matter how superb it is.

Another reason that leaders frequently pass the question of training reinforcement over to external trainers is that it can feel like a herculean undertaking. But it doesn't have to be. Most training companies offer an arsenal of post-training support and guidance on how and when to use it. Yet, leaders can drive application of the material simply by asking managers a couple of questions. For example, say you put your sales managers through training on how to coach and, as a result of that training, you expect your

managers to establish a coaching rhythm with their reps. When you run into a manager in the hallway or during your one-on-ones, ask them, *So how is it going establishing a coaching rhythm? What obstacles are you running into? How can I help and support you?*

Questions around the application of training can motivate significant change. There's a lot of power in knowing your boss has the expectation that things will be done differently. There is also a lot of power in recognition. When you see or hear about someone executing the new behaviors, acknowledge it, even if it's just with an email or phone call. Reinforcing training doesn't have to be a complicated, formal undertaking with big contests or incentive programs. Often, it's simple, everyday actions that reinforce change most effectively.

So next time you ask us what we're going to do to make our training stick, be prepared for us to turn it around: *What are you going to do to make training stick?* We can help and support various roles inside an organization to sustain training, but at the end of the day, accountability for training application resides with senior leadership. Class dismissed!



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CRM: How It's Newest Capabilities Will Impact Sales Teams

Q&A With Tim Clarke, Senior Director Product Marketing, Salesforce

Q: At its core, what do you think is the role of CRM in today's sales force?

A: Every company in the world is selling something, whether it is a product, service, brand or idea. Sales teams are the lifeblood and front line of every organization, bringing in new customers, nurturing existing relationships and driving revenue. At the same time sales teams everywhere are facing unprecedented changes brought on by digital transformation. Technology such as CRM is changing the way sales teams operate, and it can either catapult them to the top or leave them in the dust.

This new era of customer-centricity has dramatically shortened the B2B sales process and the amount of time that sales has to influence a deal. It's therefore vital for sales and marketing to deliver the best possible customer experience, from initial identification and interest, all the way to signing the deal. The only way to do that is by

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A new era of customer-centricity has dramatically shortened the B2B sales process and the amount of time that sales has to influence a deal. It's therefore vital for sales and marketing to deliver the best possible customer experience. ”

Percentage of Sale Teams Who Rate the Following as One of Their Most Important Sales Objectives Over the Next 12-18 Months*



creating a seamless, intelligent, personalized and predictive buying experience that enables sales reps to build lasting connections. The mantra of “Always be Closing” is dead. Today, you need to “Always be Connecting.” CRM enables this.

A great example of a company that is “always connecting” is SurfAir. The company saw an opportunity in the market to create an ‘all-you-can-fly’ airline for people who frequently travel up and down the west coast. They use Salesforce to ensure they are connecting and engaging with the right prospects, giving them an amazing customer experience. As a result, the airline has seen tremendous growth in membership.

Q: If you believe the research, CRM still underperforms executive expectations. Are the expectations for CRM too high?

A: Through speaking with many sales executives, I have found each has their own tactics for ensuring CRM implementation and usage meets expectations. Sales reps and managers are under constant pressure to meet or exceed their quotas, every month, quarter and year. Sales is stressful, relentless and high-pressure. Sellers need to move fast, anticipate needs, and know their customers’ business needs—all while being adept at the art of selling. CRM needs to truly add value

to the seller, as opposed to taking time away. Fortunately, we’re at the cusp of a new age of sales technology. Sales reps get intelligence seamlessly woven into their day, keeping them on top of what they need to do, combined with automated data entry. Sales managers get visibility and operational excellence that allows them to scale their teams.

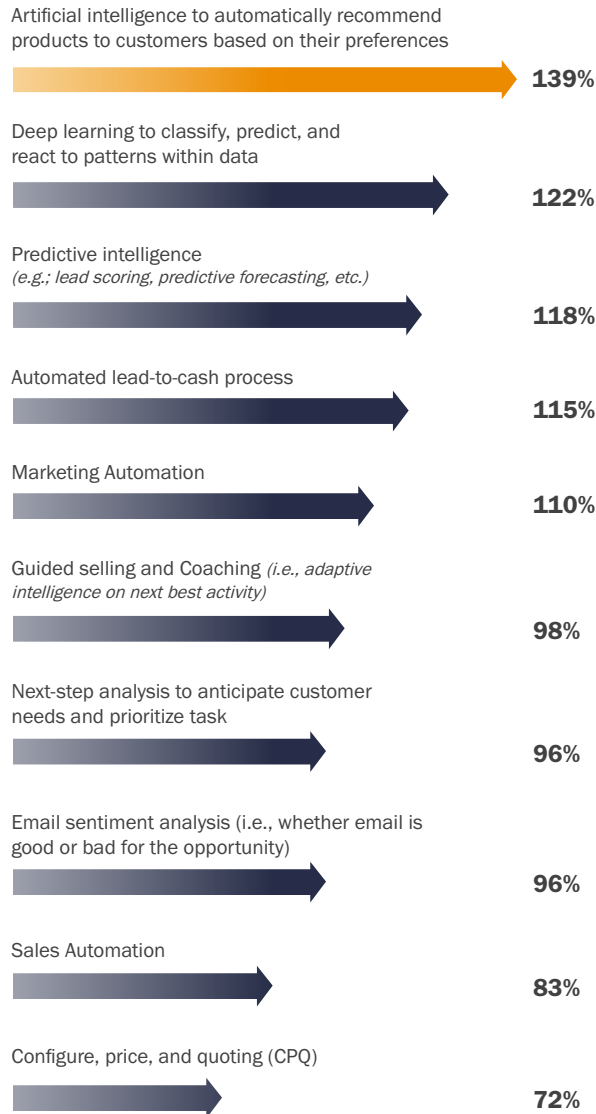
Q: As you know, Vantage Point focuses on developing front-line sales managers. What advice would you have for managers using CRM?

A: Adoption is always critical to the success of CRM. Sales reps will always input the data that aligns to the metrics their managers are targeting. Ensure these metrics are clear and visible through reports and dashboards. Look at ways to automate data inputs—for example, connecting CRM with email and calendar to minimize manual data entry for your reps. Tie your incentives or compensation to CRM. If it’s not in the system, it doesn’t exist.

Q: Is there still untapped potential in CRM? If so, where will we find it?

A: Mobile is an area of big potential. Many organizations aren’t tapping into the full potential of their CRM—specifically, being able to access their data, insights and recommendations from anywhere. We have

Sale Teams' Anticipated Growth in Usage of the Following Intelligent Selling Capabilities Over the Next Three Years



many customers taking a mobile-first strategy using Salesforce1 to achieve this. Many of our customers, including Accenture, American Express and AutoDesk, have focused in this area.

Q: SFDC has been an amazingly successful company. Why?

A: Our success comes down to the success of our customers. We are constantly focused on helping them achieve success in the way they connect with their customers through sales, service, marketing, and more. With three major releases each year, we continue to provide constant innovation to our customers through our Intelligent Customer Success Platform.

For sales specifically, we've focused on our Lightning Experience, which surfaces insights about key accounts, suggests action items to keep a deal moving, minimizes data entry, and gives unprecedented visibility into the pipeline through new features like Kanban. We are always focused on the end-user experience to give sales professionals all the key information they need at the right time, at the right place.

Q: What do you see on the horizon for CRM or for sales force technology in general?

A: The future is in intelligence! At Dreamforce 2016 we revealed Einstein, making the world's

leading CRM the world's smartest CRM. Sales reps now have predictive lead scoring that enables them to focus on closing the best leads. They have opportunity insights that alert reps when a deal is trending up or down. And automated activity capture seamlessly logs email and calendar activity with the right Salesforce record, analyzing them to deliver predictions. With Einstein, we're empowering every sales rep to be a data scientist. This is the future of CRM. For more information on our predictions for the future, see the [Second Annual State of Sales: Insights and Trends From Over 3,100 Sales Trail Blazers.](#)

Additional Resources



Video Media



Articles & White Papers



Blogs & Webinars

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The logo for VantagePoint Performance features the word "VANTAGE" in a bold, dark blue sans-serif font, followed by a stylized diamond icon composed of four smaller diamonds in blue and gold, and then the word "INT" in a bold, gold sans-serif font. The background is a faded image of a modern office with large windows, white columns, and people working at desks with computers.

VANTAGE  **INT**

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