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2019

Managing a Sales Team & Individual Players on the Team

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Core Topics of Discussion

CONNECTWISE & SERVICE LEADERSHIP INDEX BENCHMARK

SALES TEAM MEETING PURPOSE, FREQUENCY AND AGENDA

INDIVIDUAL ONE-ON-ONE PURPOSE, FREQUENCY AND AGENDA

QUARTERLY PLANNING: AS A TEAM AND FOR INDIVIDUALS

REGULAR TEAM TRAINING

During Our
Sales and Marketing Session Today

- ConnectWise is deeply vested in your business success, which is a key reason I'm here.
- Many of you have in hand, the Service Leadership Index® benchmark that ConnectWise has sponsored for you.
- What we're going to talk about today, will help you further accelerate your financial performance.
- Delivering the right lead flow and pipeline of closed deals drives your stock value. Take a look at your FDR or SLI benchmark and keep in mind how you're performing today, as we talk.

Sales Team Meeting: Purpose & Frequency

Purpose of the Sales Team Meeting

Celebrate Wins, Discuss Losses & Lessons learned from both

Team Metrics – On track for Goals as a Team or Not

Requests for Escalations and/or Clients at Risk

Issues facing the team & discussion

Action Item review

Cascading Messages

Frequency of Team Meeting

Weekly

Sales Team Meeting: Agenda

Wins/Losses (also any lessons learned to share) 5-10min

Clients at Risk &/or Escalations: 0-5min

MTD/QTD Goals 5-10min

- Revenue
- Lifecycle Management Plans/Execution
- Win7 to Win10 & Server 2008 R2 Tracker - Plan, then Completion
- Event Attendees, getting attendees

Issue Discussion & Action Items 15-25min

Peer Coaching/Collaboration and/or Cascading Messages 5-10min

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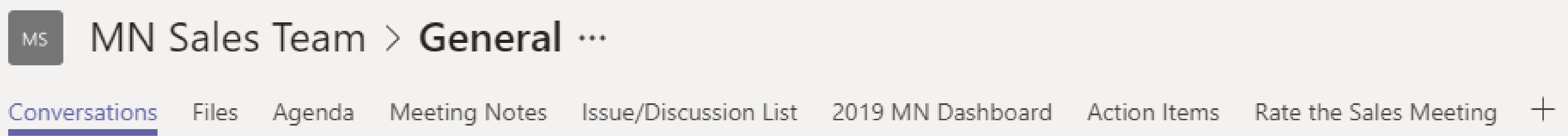
Sales Team Meeting: Tools

Use Teams:



SharePoint - Files

Wiki – Agenda & Meeting Notes

SharePoint List – Issue/Discussion List

PowerBI – Team Dashboard

Planner – Action Items

Forms – Rate the Meeting

Individual One-on-One: Purpose & Frequency

Purpose of the One-on-One

- CRM – Get the Red Out!
- Behavior Accountability
- Goal Accountability
- Any obstacles they are facing or help they need
- Deal Strategizing/Coaching
- Check-out Manager Tools App & Podcasts

Frequency of the One-on-One

- Weekly
- You will sometimes miss this which is ok

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Individual One-on-One: Agenda

Each week during our one-on-one, these items will be covered in order.

Opportunity, Activity & Ticket Management Current

Weekly Scorecard Items

Revenue Goals

MTD/QTD Objectives/Plan

Deal Strategizing/Obstacles

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Individual One-on-One: Tools

Use Teams:

Files – Commission Reports, Bonus Forms, Comp Plan

OneNote – One-on-One Notes

SharePoint – Individual Metrics manual updating

Quarterly Planning: Team & Individual

Quarterly Team Planning

- Purpose: Identify top priority items (1-3) to address
- Park Items during the quarter that are not going to be addressed
- Get team discussion & buy-in for issues
- Bonus: Don’t waste time during the quarter on issues you aren’t going to solve!

Quarterly Individual Planning

- Longer Term Initiatives
- Agreement Renewals
- Personal Development goals

Regular Team Training

- Sales Training is often too infrequent, and under valued
  - Mytech schedules team training on the First and Third Monday from 11:30am – 1pm
  - Yes, you are taking time away from being able to sell
  - Getting everyone on the same page
  - Product Training
  - Business Training
  - Vendor (Manufacturer) Partner Training
  - Local Vendor (Referral) Partner Training

Congratulations

You now have a roadmap to manage your Sales Team & Individual players on the Team!

Supporting Documents & Templates

To help you 'Take Your Next Step' I have some supporting documents & templates that may be helpful in your Sales Onboarding Journey:

- Sample Sales Team Meeting & One-on-One Agenda
- Defined Key Activity Expectations for Sales & Account Management
- Documents from my other three sales sessions on Onboarding New Sales Professionals, Managing & Compensation Planning

If you would like to receive an email with a link to download one or all of these documents, just provide me your business card and I will follow up with a page link where you can download.

Don't Forget to Fill Out Your

SESSION SURVEY

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Thank you for Attending!

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