Kick Your Sales Calling Team Into High Gear

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1. DETERMINE THE BEST STRUCTURE TO MAXIMIZE THE PRODUCTIVITY AND UNIQUE ABILITIES OF TEAM MEMBERS

❒ Assess each current team member's strengths, weaknesses and unique talents. Ask yourself the following questions:

- Who has natural sales ability and primarily thrives on getting the business?
- Who is strong at and enjoys organizing, problem solving, client relations and servicing accounts?
- Who is strong at and enjoys detail or number crunching?
- Who is not suited for my team and needs redirecting?

❒ What do we need to do to maximize the talents of my team members?

- Should we specialize by target market, niche, customer size?
- How do we implement best?
- What challenges should we anticipate?

Action Items/Team:

2. CREATE TARGET LISTS AND ASSIGN RESPONSIBILITY

Ask each sales rep to define their Top 25-50 prospects and Top 25-50 customers to target and focus their sales efforts for each quarter or the coming year.

A good target list can include:

Priority rating or potential value of each customer/prospect (A,B, C)
Estimated income, $ volume, total sales expected
Likelihood of closing in the next 3, 6, 9 months
Status/Next Step
Assigned rep or manager

Discuss with your team:

What target lists do we currently have in place? How can they be improved to be a more useful tool and easier to complete?

Action Item/Team:

3. DETERMINE TEAM AND INDIVIDUAL GOALS

Embrace the "Olympic athlete" mentality.

Assign “both” individual and team goals

Answer the following questions:

Do I have clear goals broken down quarterly or monthly for each sales rep/ calling officer? ❒ Yes ❒ No

If no, what do I need to do to help set goals?

Do we need to restructure the goals to maximize and motivate “team” performance?
❒ Yes ❒ No

If yes, how do we go about it?

To get “buy in” and motivate your team:

Discuss goals with staff and mutually agree

Reduce "big" goals to bite-size pieces. This is called "reduce it to the ridiculous."

Create a “tiered” level of performance with increased recognition or incentives for each level

Create goals that staff can monitor easily and give frequent updates.

Be ready to adjust the goals due to market conditions and other unique factors.

Action Item/Team:

4. INVEST IN A CONTACT MANAGEMENT SYSTEM

Install a **“contact management”** client intelligence system to record all customer calls, conversations, services taken and follow-up action.

A powerful contact management system can be used to do the following:

Record conversations and key customer concerns
Schedule follow up actions with an alarm to remind you
Schedule all “to do” and action items in the client record and link to your calendar
Allow you to prioritize A, B, and C prospects or action items
Link all incoming and outgoing emails to each client record
Link all Word documents to each client
Print numerous sales reports by city, $ _______, title, Top 50, or any other “filter” you create
Allow you to market by email and stay in touch with prospects

What do we currently have in place?

What do we need to record client calls more effectively and share information?

What have I done to make sure each of my team members has an organized follow up system and is using it consistently?

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Action Items/Team:

5. GET PEOPLE OUT ON CALLS AND FOCUSED ON REVENUE

Dedicate "focus" days to generate revenue (Adapted from Dan Sullivan's Strategic Coach)

Assign "focus" days to your team members to schedule sales calls and let it be known that they cannot show up at the office (e.g. Tuesday is Sally's day and Wednesday is Tom's day)

Schedule more joint calls to increase activity.

6. COACH AND CRITIQUE SALES CALLS TO BUILD CONFIDENCE

Periodically coach and critique calls and offer suggestions and feedback. (Note: If a sales manager is unsure of his/her own sales aptitude, it is recommended he/she go on several calls with a peer to practice prior to coaching other team members.)

❒ Immediately after a call, ask your rep to conduct a self-critique and then offer your feedback based on a checklist. Identify strengths first and areas for improvement. (See sample form on next page.)

- What are "red flags" or pitfalls to listen for in a sales presentation?

a.	d.
b.	e.
c.	f.

Action Item/Team: (Assign sales call or swat team coaches)

AVAILABLE CDS/AUDIO CASSETTE TOOLS

NOTE: Two previously recorded teleseminars offer in depth information on how to pre-call plan effectively and how to make and critique an effective sales call. The following two topics are available on CD and includes a handout for only $18:

Pre Call Planning- Winning Sales Strategies of Top Performers

Mastering the Sales Call Process- A Self Evaluation

To order, email Cindy@RomanoSanfilippo.com with your complete address, credit card number, and quantity desired or call (760) 738-9100 or fax back the order form attached.

EVALUATION / OBSERVATION FORM

Name: ______________________________ **Date:** ____________________

Position: ____

	Rate 1-10*
Preparation and Pre-Call Planning	______
Professional Appearance	______
Self-Organization (Properly Planned Day)	______
Knowledge of Customer	______
Knowledge of Competition	______
Selling Skills	
Establishing Rapport	______
Listening Skills	______
Determining Needs/Probing (Open probes vs. Closed probes)	______
Presenting Benefits	______
Product Knowledge	______
Use of Brochures, Sales Tools, Testimonials	______
Handling Objections (Acknowledge, Probe or Respond)	______
Closing/Ask for the Business	______

Areas for Improvement:

*On the 1-10 scale, 1 is very poor; 10 is perfect. Less than 4 is well below standard; more than 7 is good.

7. PLAN RESULTS-ORIENTED AND PARTICIPATIVE SALES AND SERVICE MEETINGS

- ❒ Review the team goal
- ❒ Review individual results
- ❒ Include sell and tell
- ❒ Review "Top A" prospects
- ❒ Brainstorm obstacles
- ❒ Conduct a sales skill review
- ❒ Review product knowledge
- ❒ Have an associate present
- ❒ Bring in a guest speaker
- ❒ Encourage role-play
- ❒ Summarize action items
- ❒ End with recognition/reward

Sales Meeting Tips:

Go around the room and ask everyone to read from their contact management or call reports; how many contacts they have had with a customer; is it an “A” or “B” contact; personal and business facts gleaned and the next step.

❒ To avoid “stale” or "off focus" sales meetings:

- Build in interaction
- Stick to the agenda
- Change the location
- Vary the length/format

Action / Item: To improve our sales meetings, I recommend we:

1.

2.

3.

4.

5.

SUMMARY DISCUSSION

The three "priority" items we need to act on immediately are:

1.

2.

3.

Possible pitfalls or obstacles that may hinder our progress are:

1.

2.

3.

To order the CD or cassette of this program, get more information about our "Sales Calling Team Retreat," sales training, private telecoaching, or to schedule Barbara when she's in your area, email Barb@romanosanfilippo.com, call 1-877 I SUCCEED, or fax or email back the order form.

FAX BACK
Rapid Response Form
Kick Your Sales Calling Team Into High Gear
Date:______________________

To: **Barbara Sanfilippo** **Email:** **Barb@RomanoSanfilippo.com**
Fax: (760) 738-8900 **Phone**: (760) 738-9100

- ❑ I would like information on Barbara's coaching services by telephone to improve sales and service management skills.
- ❑ I would like information on having Barbara conduct a private teleseminar for my company.

SALES, SERVICE AND MOTIVATIONAL RESOURCES

Audios/CDs – One hour programs with handout. Recorded from Barbara's teleseminars on the following topics:

1. Pre-call Planning – Winning Sales Strategies of Top Performers
#____ CDs/$18 **$_______**

2. How to Build A Winning Sales Team – Sales Management Best Practices
#____ CDs/$18 **$_______**

3. Master the Sales Call Process – A Self Evaluation
#____ CDs/$18 **$_______**

4. Kick Your Sales Calling Team Into High Gear! Best Practices, Tools, and Structure To Make it Happen
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5. Recognition and Reward Programs: The Agony and the Ecstasy!*
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6. Develop A Customer Relationship and Retention Program*
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8. Focus On Service And Revenue Will Follow
#____ CDs/$18 **$_______**

9. Winning Sales & Service Strategies of Top Performers – The Critical Edge!
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10. Dream Big! What's The Best That Can Happen?
#____ Book/$13 **$_______**

***We also have self-instructional "GuideBooklets" with exhibits, and sample forms to assist your recognition or customer relationship teams as well as a one-day training class, call or email for additional information.**

Shipping and handling: $ 2.25 first item/$.50 for each additional item $_______

California residents add 7.75% sales tax per item $_______

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