RICHARDSON
SALES PERFORMANCE



The Three Key Skills for Driving Sales Performance

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The modern sales manager needs agility to drive performance across three levels of the organization.

Sales managers need a way to focus their expertise on individual pursuits, a broad range of opportunities, and the complete pipeline of the selling organization. These three domains represent three different levels, one narrow, one mid-level, and one broad.

At the narrow level, sales managers need to deliver the kind of focused coaching that can equip a sales professional to push a difficult sale over the line. This kind of leadership is about becoming familiar with the details of a particular sale and offering insights at a critical juncture.

At the mid-level, they need the skills to measure the value of an opportunity and ensure that the seller's efforts are directed towards the deals that meet revenue requirements and are a fit for the solution.

Finally, at the broad level, sales managers need the purview to properly assess the entire pipeline, identify gaps, and overcome blockages so they can help their team deliver on long-term goals.

Here, we provide the framework needed to be effective in each of these three settings. We offer the key steps sales leaders need to succeed everywhere from the confines of a nuanced deal to the large scale of the entire sales organization.

Developing these capabilities enables the sales manager to lead at all levels.



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01 Coaching in the Field

Great coaches look at the field, not just the scoreboard

Field coaching aims to address a specific challenge within an individual pursuit. In many cases this challenge is unexpected and threatens the success of the sale.

The sales manager's challenge is to be able to narrow their focus to the individual issue and offer support without undermining the seller who owns the deal. Achieving this balance means having a plan. Our work with hundreds of selling organizations has revealed that such a plan consists of two key parts.

USING PREPARATION TO DETERMINE THE RESPONSE

First, the sales manager needs to prepare. This is a critical step because the sales manager has a limited amount of time to become clear on the details of the sale and the challenge at hand. This must happen in collaboration with the seller to ease any stress they may feel as a result of being coached.

In these preliminary conversations, the sales leader equips themselves with the details surrounding the seller's current pursuit. This information enables the sales leader to identify what skills they need to develop within the seller. The leader must also use this information to determine what role they will adopt. The sales leader might choose to be an observer who offers feedback following customer conversations, or they might choose to be a model who displays the specific behaviors they would like to see from the seller.

TAKING A MEASURED APPROACH TO FEEDBACK

Second, the sales manager needs to be able to provide field coaching and feedback with a measured approach. This means knowing when to step in and when to refrain from intervening. An effective coach only intervenes when the consequences of not doing so are significant. For example, a coach might need to step in if the seller moves forward without fully understanding the customer's needs. They might also need to step in if the customer is about to make a decision based on incorrect product information.

Feedback must begin by identifying what went well in the customer call. The seller should have an opportunity to cite areas where they were effective. Then, the coach has an opportunity to discuss what they believe the seller did well. Feedback works when it is balanced, honest, and direct. It is balanced when the coach listens as much as they talk. It is honest when it identifies the most important areas in need of improvement. It is direct when communicated succinctly.

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02 Conducting Opportunity Reviews

Developing efficiency means knowing where to direct resources

When a sales manager develops a consistent approach to opportunity reviews, they are better equipped to qualify deals with greater accuracy, use resources more efficiently, and close more deals.

To fully benefit from these outcomes the sales manager must be able to bring the same level of rigor to each opportunity review. Doing so means committing to a repeatable approach consisting of three parts.

PRIORITIZE OUTCOMES OVER ACTIVITIES

An activity, like recording an event in a CRM platform, can feel like an accomplishment. These activities, however, do not always move the deal forward in a meaningful way.

The most effective opportunity reviews take the time to analyze what verifiable outcomes have been achieved and the specific actions needed to reach the next intended outcome. The sales manager has a responsibility to focus the conversation only on the selling moves that advance the buyer through the pipeline.

CHOOSE A CONSISTENT SET OF CRITERIA

Sales managers must choose where to focus their limited time. Some choose to do so subjectively, often leading to inconsistent results. An effective opportunity review leverages an objective approach to these decisions based on data. For this reason, it is important that the sales manager clarifies the criteria they believe is meaningful to the sale. That criteria may include milestones like identifying those with decision-making power in the buying organization, confirming the customer's needs, and reaching a verbal agreement.

REVIEW THE RIGHT OPPORTUNITIES

Opportunity reviews are about more than focusing the seller on the right actions. They are also about keeping the manager focused on the right opportunities. It is not feasible for a manager to review every opportunity each seller is pursuing. Sales managers need to be discerning in how they determine which opportunity reviews they will conduct. Doing so means considering the financial value of a pursuit, the fit between the solution and the customer, and the seller's access to key stakeholders.

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03 Managing the Pipeline

Pipeline management brings early visibility to hidden challenges

Pipeline management examines the progression of opportunities through the organization. Making pipeline management work means first helping the seller understand that it is not just a management practice, and that it has considerable benefits to the sales professional, as well.

A wide view of the pipeline is what ensures that sellers direct their time and resources to the right opportunities in the right way. This happens with a three-part approach.

GETTING CLEAR ON THE PARTS OF A HEALTHY PIPELINE

First, both the sales manager and the seller need to understand the components of a healthy pipeline. In most cases these components include the right balance between deal sizes and number of deals, the right mix of products across deals, a range of opportunities across stages in the sales process, and opportunities that are in alignment with business goals.

ISOLATE PROBLEM AREAS

Second, sales mangers need to analyze the pipeline. Doing so means understanding the three causes of any pipeline problem which are gaps, blockages, and leaks. Gaps are often the result of insufficiently qualified opportunities, improperly valued deals, and a lack of customer questions. Blockages in the pipeline often occur due to pricing challenges, inaccessibility of stakeholders, and a lack of internal teamwork. Finally, leaks in the pipeline frequently start with competitive pressures, poor articulation of value, and an incomplete assessment of needs.

BECOMING CONSISTENT WITH THE PIPELINE REVIEW

Pipeline discipline is about committing to a schedule. Sales managers need to set a frequency at which they will review progress with sellers. Sales managers also need to be aware of common challenges that emerge across numerous pipelines. If there is a common point of failure among the pipelines of numerous sellers, the manager must have the discipline to act early, and develop a solution that addresses them all.

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To learn how we can equip your sales managers with the skills needed to build and lead a successful sales organization, contact us at +1-215-940-9255 or at info@richardson.com

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