YOURSALESENERGY

ULTIMATE MSP SALES PLAYBOOK

Jamie Williams

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MSP GO

Ultimate MSP Sales Playbook

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Introduction: Building the Ultimate Sales Team

(Don't skip this part!)

This book embodies a simple concept that will change the way your MSP finds leads and closes deals: **sales follow strategy**.

Strategic planning, processes, and accountability are your keys to building the ultimate sales force – and the pages that follow will show you how to access and use these keys. The information you are about to read has been developed by our MSP sales/operations professionals and our writers over the course of several years. **What you will learn has guided other MSPs from small startups to national leaders in the IT Channel.**

The methods in this book are not speculative or theoretical. They are very much practical, accessible, and effective.

Your MSP's journey to greater sales success begins with **clarity**.

Without a clearly defined mission and an organization-wide understanding of the business, a sales department cannot by fully effective.

Simply put, a sales team needs strategic guidance. Sales leadership develops this strategy; it is your salespeople's job to execute that strategy in the market. Management must be able to inform your sales team about:

- **Why does our company exist?**
- **What direction is the company headed and why is this the correct course**?
- **What do we sell and why do we sell it**?
- **Which markets do we pursue and where are we positioned in those markets?**
- **What is the competitive landscape and how we stack up against competitive offerings?**
- **Why are we better than or different from our competitors?**
- **Why is our pricing model appropriate for the value we create in the market and against the competition we're facing**?

Your sales team must know the answers to each of these questions as they form the foundation of the overall sales strategy. Again, it is the role of leadership to define these answers and set forth a strategy that the sales team can execute. (Individual salespeople should not be creating their own strategies!)

The first section of this playbook works to answer to these questions and spin that information into a workable sales strategy.

Defining Your Sales Organization

Core Focus, Values, Differentiators

"The keys to brand success are self-definition, transparency, authenticity and accountability."

— Simon Mainwaring

Defining Your Business

Core Focus:

Our Values:

Our Three Unique Propositions:

Company Overview:

Full Legal Name: _____
Year Business was established: _____
Ownership Structure: _____
Number of people currently employed: _____
Total number of managed clients: _____

Description of geographic reach and market:

Description of Strategy in the marketplace:

Developing Your Sales Story

Work with your entire team to develop this part of your branding and sales strategy. You must include your marketing department or marketing provider. Whether you already have a sales team or looking to hire for the first time, this story will be essential when it comes time to training your staff.

Three Critical Building Blocks for a Compelling Story

There are three critical sections, or building blocks, to a compelling sales story:

1. Client Issues Addressed
2. Offerings
3. Differentiators

Customer/Client issues, the first building block and bedrock of our compelling sales story, refers to:

- Customer pains we remove
- Client problems we solve
- Opportunities we help customers capture
- Results we achieve for clients

Offerings, our second building block, simply state *what* we sell (emphasis on simply). Our offerings are what we do – the services, solutions, or products for which we bill customers.

Differentiators, the third building block, explain *why* we are better and different from other alternatives. This final building block provides solid reasons why we are the best choice to address the client's issues, as listed in the first section of the story.

And the sequence matters – a lot! As important as the actual components themselves is the order in which we use them.

The issues we address for clients serve as the lead-in to our sales story because that's where the power is derived. We lead with the pains we remove, the problems we solve, and the results we achieve for customers because those things are important to them. These issues draw people in and get them to pay attention to the rest of the pitch.

When we lead with client issues, we set ourselves up as problem solvers. By talking about the clients' needs first, we position ourselves as professionals who can address *their* issues.

Another benefit of leading with client issues is that it sets us up to ask probing questions about those very issues later in the sales process. In a sense, we foreshadow where we plan on taking the sales conversation.

Once complete, the power statement serves as a one-page, two- to three-minute encapsulation of our sales story. It can be used by itself, in full form when speaking with someone face-to-face (on sales calls) or when elements from the power statement are excerpted for use in other sales weapons (telephone, voice mail, e-mail, presentations, proposals, etc.)

Transitional Phrase

This brief phrase sets the stage to grab your contact's attention. It opens the door to share the client issues your business addresses. This phrase starts with either the type of business you are pursing or the position of the contact you are addressing.

For example:

Finance companies turn to [Your Company Name Here] when….

Or:

Senior marketing executives look to [Your Company Name Here] when they….

This type of lead-in is a shrewd technique that allows us to speak in the third person about what we accomplish for our customers. Instead of simply declaring our results in a brash or bragging fashion, we make compelling points about why our customers look to us for help. In a sense, the transitional phrase couches our strongest selling points as if they were a testimonial coming from our best clients.

Client Issues / Pains Removed / Problems Solved / Results Achieved

This section of the power statement lists between three and seven client issues we address. Use a conversational, bulleted format, describing each issue briefly using provocative or emotionally charged words. For instance:

- Striving to achieve Result 1
- Frustrated from dealing with Pain 2 and ready to take action.
- Under significant pressure to eliminate Problem 3.
- Committed to accomplishing Result 4.
- They've had it with Pain 5.
- Facing threats (or regulatory pressure) from Issue 6.
- They are finally tired of living with Problem 7 and want help tackling it.

Offerings

This very brief section of the power statement is where we rattle off what it is we actually sell. It works best to simply describe our offerings in a few sentences, being careful not to embellish or oversell here. Our offerings are the least compelling component of our story, and that is why this section is short and sandwiched between the client issues we address and our differentiators.

The power statement concludes with a strong list of reasons that we are the best choice to address the client issues we previously described. This is our opportunity to brag and declare why our offerings are better than other options available to the customer. I suggest leading into a list of at least five differentiators with an intriguing sentence. For example:

[Your Company Name Here] continues to grow (or dominate our space) because we are very different from what you will find in the marketplace…

Differentiator 1
Differentiator 2
Differentiator 3
Differentiator 4
Differentiator 5

Sample Power Statements

Awesome MSP is the premier cybersecurity services provider in the United States. We work with medium to large enterprises to protect their networks and data with truly integrated security.

Transitional Phrase and Client Issues Addressed

Business owners look to Awesome MSP when:

- Frustrated that their current security service is not doing what was promised when it was "sold" to them.
- Facing excessive liability exposure to data breaches.
- They've had it with cybersecurity providers who are not responsive or communicative.
- They must meet compliance standards.
- They're searching for a truly integrated solution combining firewall, AV, spam filtering, and 24/7 SIEM/SOC.
- Their current MSP provides no peace of mind regarding their threat profile.

OFFERINGS

We provide true integrated cybersecurity, Awesome MSP's services include a U.S.-based SOC, a comprehensive layered security stack, and affordable, per-user pricing.

DIFFERENTIATORS

Awesome MSP continues to dominate the cybersecurity market because we are very different from the other available alternatives:

- We are a true one-stop shop that provides real integrated solutions.
- We are "vendor agnostic", allowing us to provide the best-fit products for your particular application.
- No on handles cybersecurity threats better or responds faster. It is our specialty.
- We have, without question, the most professional and helpful customer service in the industry.
- Our clients don't leave us. And the very few that did came back.

Defining Your Power Statements

Start with three blank sheets of paper. We'll use them to brainstorm lists for each of the three main sections of the power statement: one sheet each for client issues, offerings, and differentiators. Tackle the client issues first. It is the most critical and usually takes the most effort to get right. As with any good brainstorming session, don't overthink it. Write down every thought that comes to mind. Even before scanning your sales and marketing literature or talking with clients, start by writing answers to these questions on your client issues sheet:

- Why did your best customers initially come to you?
- What business problems were they facing?
- What results were they looking to achieve?

Once you have a solid list started, move on to the next set of questions. These questions help you dig a little deeper into the client issues you address:

- What pains are your potential customers likely to experience by choosing or staying with the wrong provider (your competition)?
- What problems do you see prospects experiencing from trying to do for themselves what you should be handling for them (self-performing versus outsourcing)?
- Which opportunities might they miss, or which results will fall short because they are not your customer? Said another way, what is the opportunity cost of not working with you?

Next call your absolute favorite customers, the ones who are advocates and raving fans. Don't email them but call them. Let them know you're working on sharpening your sales story and would be honored if they would help. Ask these customers:

- Why did you come to us in the first place? What were you looking to achieve?
- What issues were you looking to address?
- Why do we still have your business? (Listen carefully to these answers because you might get some bonus material to use on your differentiators list.)
- How have we made your life and business better?

Your customers are reminding themselves why they love you, and you get to incorporate their words into your sales story. It doesn't get any better than that.

Finally, scan through your marketing materials. Pull out great phrases that speak to the business issues your company addresses for customers. Be careful not to get lulled into listing reasons your company is so wonderful. Find the gems describing what you achieve for customers and incorporate those into the giant list you've been creating.

Now argue the list down to the seven or so best "client issue" bullets. Then you can start wordsmithing, nuancing each bullet into a format that nicely follows the transitional phrase: "X type of companies or Y type of contacts turn to Your Company Name when looking to…" or " They look to us when facing…" Make an effort to incorporate compelling, emotional, or provocative words or phrases to describe your client's experience. For instance, customers are exhausted from, frustrated with, challenged by, have had it with, or fearful of, pressured to, or are desperately trying to achieve some result.

Once you've refined the list to the point where it is ready to insert into the power statement, move on to the differentiators section. This section tends to come more naturally and go faster than the client's issues page. List all the reasons that you believe your company, product, service, or solution is better and different. Cover the gamut of reasons, from culture issues through technical expertise, proprietary processes, and service guarantees. Don't forget to include yourself and the difference you bring to the table for clients. In some cases, the salesperson is one of the most significant differentiators in the equation. Review, edit, and sharpen what you came up with until you have a strong list that you love.

The offerings section should take less than five minutes to complete. If you can't rattle off exactly what it is you sell, what you send invoices for, then there's a bigger problem. Craft a couple of direct sentences and insert them between the client issues section and the differentiators.

In most cases, it takes a few weeks of tweaking and revising to get it where you want it.
The power statement is an internal document, not a handout. It's for internal use only. The power statement becomes an invaluable source document for creating other sales weapons. It provides the talking points or copy highlights we need in various situations.

If you want to send a brief series of e-mails as part of a drip campaign, the power statement is where you start. You can personalize a brief introduction and then pivot to a transitional phrase before dropping in just a couple of key issues you address for clients. One slight alteration to the transitional phrase that works well in a brief e-mail goes something like this:

We serve logistics managers (or another appropriate contact position) who are telling us they're facing Issue No. 1, which requires immediate attention, or they are working to solve Issue No. 2, which if not addressed is causing Issue No. 3.

I might choose to include an offering or two and possible one differentiator, but I would stop there in an e-mail. You could follow up with a second email a week later. This time repeat just one of the same client issues from the first email and pick out a different issue from your power statement to go with it.

A completed power statement also serves as a perfect guide to craft probing questions for the discovery part of our sales calls. Start with the bullet points you wrote describing the client issues you address, then turn them around by rephrasing the statements as questions. Using Awesome MSP as the example, here are some easily created open-ended, issue seeking questions:

- What do you wish your current security system could do that it isn't doing now?
- Tell me about the last few significant safety events. Where was the security lapse, and what was the reaction of your tenants?
- We often hear about security guards embarrassing building management. What are some of the behaviors of your current guards that you would like to see changed or improved?
- Under your current setup, what happens when a true emergency strikes? Who will respond and how will it be handled?

Attracting and Hiring Top Performers

Job Listings, Interviewing, and Selection

"Hiring should always be part of your long-term strategy,

not a quick fix to an immediate problem."

— Steven J. Bowen

Job Description of a Sales Representative

The New Business Development position is best described as a "hunter" sales manager position that is responsible for booking **new** Managed Service Agreements as well as managing the sales department and its employees to reach the collective sales goals and annual business objectives.

Essential Functions

- Direct Sales, Marketing, or Customer Service Activities.
- Selling or Influencing Others.
- Establishing and Maintaining Interpersonal Business Relationships to facilitate work activities.
- Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Monitoring/Assessing performance of yourself, other individuals, or organizations to make improvements or take corrective action.
- Communicating with Supervisors, Peers or Subordinates.
- Coaching and Developing others.
- Guiding, Directing, and Motivating Subordinates.
- Developing and Building Teams.
- Making Decisions and Problem Solving.
- Developing Objectives and Strategies.
- Prospects for new clients through various activities including cold calling, referrals, attending events, relationships and networking to establish sufficient opportunities to build a pipeline of potential business.
- Qualifies opportunities by are assessing need, timing, budget, capabilities match and implementation schedule.
- Gathers customer or product information to determine customer needs.
- Visits prospect establishments to evaluate needs or to promote product or service sales.
- Closes sales timely in enough volume to meet monthly and annual business objectives.
- Record activity in our CRM software.

Additional Responsibilities

- Attends and participates in marketing events.
- Go on "Discovery Meetings".
- Creating Proposals and Presentations
- Working Company Events
- Attending Seminars
- Networking and other lead generating activities
- Performs other duties as assigned.

Complexity of Work and Decision Making

- Wide variety of duties requiring considerable judgment to work independently devising new methods, adapting or changing standard procedures to meet new conditions and making decisions guided by precedent and within the limits of established policies.

Autonomy and Accountability

- Works from general objectives (such as increase in sales, revenue or product) and broad and varying policies, procedures, rules or precedents with little functional guidance. Rarely refers specific cases to CEO unless clarification or interpretation is involved.

Technology, Equipment or Tools

- General office equipment is used including computer and phone system.

Physical Demands and Work Environment

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is regularly required to sit while using hands to use a computer or other technologies. The employee frequently is required to see, hear, and talk. The employee is occasionally required to stand, walk, and reach with hands and arms.
- Works primarily in an office setting with moderate to light noise
- Requires local travel, a vehicle, and a valid driver's license.

Education & Experience

- Bachelor's degree from an accredited university or college in a business or marketing-related field and a minimum of two (2) years' work experience in a related job field, or an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

Knowledge, Skills & Abilities

- Relevant computer industry knowledge.
- Proficient in Microsoft Office Suite.
- Persuasive customer service skills.
- Strong written and verbal communication skills.
- Excellent organization and administrative skills.
- Ability to plan and prioritize to achieve a defined objective.
- Formal presentation skills.
- Strong creativity and out-of-the-box thinking.
- Ability to adjust actions in relation to others' actions.
- Strong problem-solving skills

Job Description of an Inside Sales Representative

The Sales Executive is responsible for successfully prospecting, qualifying, presenting proposals, and closing sales in a timely enough volume and gross margin to meet monthly and annual business objectives.

Essential Functions

- Calls a warm list of prospects and sets appointments, for our senior team.
- Sending out meeting offers
- Following up to set appointments
- Maintaining the integrity of the company's database,

Additional Responsibilities

- Attends and participates in marketing events.
- Performs other duties as assigned.

Complexity of Work and Decision Making

- Wide variety of duties requiring considerable judgment to work independently devising new methods, adapting or changing standard procedures to meet new conditions and making decisions guided by precedent and within the limits of established policies.

Autonomy and Accountability

- Works from general objectives (such as increase in sales, revenue or product) and broad and varying policies, procedures, rules or precedents with little functional guidance. Rarely refers specific cases to supervisor unless clarification or interpretation is involved. Review by supervisor focuses on achievement of the objective and not on the means.

Technology, Equipment or Tools

- General office equipment is used including computer and phone system.

Physical Demands and Work Environment

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is regularly required to sit while using hands to use a computer or other technologies. The employee frequently is required to see, hear, and talk. The employee is occasionally required to stand, walk, and reach with hands and arms.
- Works primarily in an office setting with moderate to light noise
- Requires local travel, a vehicle, and a valid driver's license.

Education & Experience

- Must have experience in successfully scheduling appointments, working knowledge of Microsoft Word and Excel, as well as Internet research (i.e. LinkedIn, ZoomInfo, Google and other business search websites).

Knowledge, Skills & Abilities

- Relevant computer industry knowledge.
- Proficient in Microsoft Office Suite.
- Persuasive customer service skills.
- Strong written and verbal communication skills.
- Excellent organization and administrative skills.

Key Responsibilities of a Sales Representative

Managing your Time

The most significant commodity you have is time. How you manage your time by investing in quality relationships with vendor partners, prospects and customers will eventually determine the revenue you can generate – which translates to your personal earning potential. Your responsibilities as a Business Development professional are to build relationships that will support your client base. This means that you need to seek out and nurture relationships with [YOUR BUSINESS NAME] personnel, with local businesspeople that have complimentary services to [YOUR BUSINESS NAME] and manufacturer vendor partner representatives. Sales can be a very lonely game when you first get started building your client base. Fostering relationships takes an investment of time which is why you need to start this process early and make a continual effort to connect with resources that will help you build and serve your clients.

Building Relationships

When meeting with [YOUR BUSINESS NAME] customers or prospects you will be representing yourself and everyone at [YOUR BUSINESS NAME]. It is your responsibility to carry yourself professionally and always act in accordance with our Mission, Vision and Values. The role that [YOUR BUSINESS NAME] expects of sales professionals is that you work with our prospects and customers to understand their vision, goals and objectives so that you can carry that understanding into [YOUR BUSINESS NAME] to ensure that our solutions are in alignment with those goals!

Asking questions of our customers to drive to the "why" and understanding of the business impact are critical to our success. We need to be able to communicate the business reasoning for any technology recommendation or change so that our entire company has a purpose behind the implementations we provide and the services we deliver. Additionally, during the sales process there will be many opportunities for building the relationship and making sure that you understand the business impact. Being able to articulate the business impact and how it protects and enables our customers objectives will help you to keep the process moving forward. Having that understanding will also build a case for your follow up plan which will come into play at the different decision-making junctures during the sales process – It will be elaborated on this later in the sales process.

Prospects – Asking questions, finding pain, selective value proposition, verifying opportunity alignment, qualifying philosophical alignment and that IT is a strategic asset for achieving their goals, and establishing next step agreement. Meetings and Appointment setting, finding new potential complementary partners.

Vendors – Engaging with partners for awareness, opportunities, leads, sponsorship funds, market awareness, Tradeshow participation, forming industry alliances. Building reciprocal relationships with local Vendor Partners are your best source of lead generation.

Internal Resources – Act as a client liaison and conduit to the [YOUR BUSINESS NAME] service team. Help to remove roadblocks or service issues that fall outside of the [YOUR BUSINESS NAME] workflow.

Generate Revenue

Based on historical data of the market we serve an established sales professional should be able to develop and maintain a book of business that satisfies sales goals. Everyone on the sales team is to aid in identifying ways in which we can solve our customers technology challenges through services delivered. Our role is to understand their business, learn what objectives they desire to accomplish and help them achieve those goals (where appropriate) by effectively leveraging technology.

Job Description of Director of Business Development/Sales Manager

To manage support functions essential to sales force productivity. These include planning, reporting, quota setting and management, sales process optimization, sales job design, sales training, sales program implementation, sales compensation design and administration, and recruiting and selection of sales force talent. The Business Development Manager is responsible for the overall productivity and effectiveness of the assigned sales organization.

Outcomes

- Manage the sales team which involves hiring, coaching, activity tracking, reporting, evaluating performance, and firing if needed
- Define and maintain the sales strategy required to meet [YOUR BUSINESS NAME]'s sales goals and revenues and update based on actual performance
- Understand and maintain the integrity of the CRM
- Implement and maintain a sales team playbook
    - Hiring process (ideal salesperson)
    - Sales training
    - Ideal [YOUR BUSINESS NAME] Client
    - KPI's
    - Prospecting
    - Sales scripts
    - Discovery meeting scripts
    - 2nd meeting presentation script
    - Objection handling scripts
- Maintain and set personal and team sales goals each month
- Ensure the sales team has the necessary resources to perform properly
- Investigate lost sales and customer accounts
- Track, collate and interpret sales figures
- Develop pricing schedules and rates
- Cultivate effective business relationships with executive decision makers in key accounts
- Formulate sales policies and procedures
- Help prepare, control, and monitor budgets
- Conduct market research and competitor analyses
- Develop promotional ideas and materials
- Use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems
- Prospect for new clients through various activities including cold calling, referrals, attending events, relationships and networking to establish sufficient opportunities to build a pipeline of potential business
- Qualify opportunities by assessing need, timing, budget, capabilities match and implementation schedule
- Gather customer or product information to determine customer needs
- Visit prospect establishments to evaluate needs or to promote product or service sales
- Close sales timely and in enough volume to meet monthly and annual business objectives

Competencies

Social Skills

- Persuading others to change their minds or behavior
- Adjusting actions in relation to others' actions
- Bringing others together and trying to reconcile differences
- Actively looking for ways to help people
- Being aware of others' reactions and understanding why they react as they do

Work Skills

- Disciplined
- Sense of urgency
- Organized
- Good communicator and public speaker
- Motivational leader
- Collaborator and contributor to their environment

Personal attributes

- Personal integrity/honesty
- Positive attitude and vision
- High self esteem
- Good manners, says Thank You
- Good listener
- Curious and inquisitive about others

Business acumen

- Industry, company, and service knowledge
- Driven by market share
- Needed technology skills and understanding
- Sales skills, training, and experience
- Has existing relationships
- Driven by value proposition

Desire to grow

- Reads/attends educational opportunities, thirst for knowledge
- Has a personal mission/vision/goals
- Sees themselves as coachable

Job Description of Marketing Manager

To manage functions essential to lead generation, brand awareness, and prospecting. These include planning, executing, and reporting on marketing initiatives (including, but not limited to, digital marketing, social media marketing, events, networking, direct mail, and webinars.) The Marketing Manager is responsible for the overall productivity and effectiveness of the company's marketing, including in-house, freelance, or outsourced work toward that end.

Outcomes

- Manage the marketing team which involves hiring, coaching, activity tracking, reporting, evaluating performance, and firing if needed
- Define and maintain the marketing strategy required to meet lead generation goals and update based on actual performance
- Understand and maintain the integrity of the CRM
- Maintain and set personal and team KPIs
- Ensure the marketing team has the necessary resources to perform properly
- Track, collate and interpret marketing data
- Assist in developing pricing schedules and rates
- Cultivate effective business relationships with vendors and adjacent businesses
- Help prepare, control, and monitor marketing budgets
- Conduct market research and competitor analyses
- Develop promotional ideas and materials
- Use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems
- Develop lead generation funnels which produce viable Marketing-Qualified Leads
- Gather customer or product information to determine customer needs

Competencies

Social Skills

- Persuading others to change their minds or behavior
- Adjusting actions in relation to others' actions
- Bringing others together and trying to reconcile differences
- Actively looking for ways to help people
- Being aware of others' reactions and understanding why they react as they do

Work Skills

- Disciplined
- Creative problem-solver
- Sense of urgency
- Organized
- Good communicator
- Motivational leader
- Collaborator and contributor to their environment

Personal attributes

- Personal integrity/honesty
- Positive attitude and vision
- High self esteem
- Good manners
- Good listener
- Curious and inquisitive about others

Business acumen

- Industry, company, and service knowledge
- Driven by market share
- Necessary technology skills and understanding
- Marketing skills, training, and experience
- Familiar with all tools used in marketing efforts
- Driven by value proposition

Desire to grow

- Reads/attends educational opportunities, thirst for knowledge
- Has a personal mission/vision/goals
- Sees themselves as coachable

Key Performance Indicators (KPIs)

Sales Representative KPIs (Monthly)

LinkedIn Mail Requests Sent	
Prospecting Calls	
Attend Networking Functions	
Canvassing	
One-on-One Meetings	
First Meetings Set	
Discovery Meetings Attended	
Proposals Presented	
MMR in Sales Funnel	
MMR Sold/Month	
Prospects Added to CRM	
Opportunities Updated	
Calendar Blocks Created	

Inside Sales Representative KPIs (Monthly)

Unknowns Scrubbed	
Google-Researched Businesses	
Total Calls Made	
Total Unknowns Converted to Prospects	
Total New Businesses Added to CRM	

Director of Business Development/Sales Manager KPIs (Weekly)

New Prospects	
Cold Calls	
Self-Set Appointments	
Attend Discovery Meetings	
Attend Proposal Meetings	
One-on-One Meetings	
Personal Sales Quota (MRR / Month)	
Team Sales Quota (MRR / Month)	
Teams Sales Pipeline (MRR / Month)	

Marketing Manager KPIs (Weekly)

Prospects Scrubbed/Located	
Marketing-Qualified Leads (MQLs) Generated	
Total Opportunities in Funnel	
Referrals Received	
Email Marketing Open Rate	
Email Marketing Click-Through Rate	
Unique Website Visitors	
Total Recurring Revenue in Funnel	
Opportunities Updated	
Calendar Blocks Created	

MSP Sales Team Hiring Process

Interview

This is a chronological interview starting with school years and progressing through many questions about every job starting with the first job and moving forward to the present period then there are additional questions slash plans and goals, self-appraisal, and a few final competency questions. This interview delves into every success, failure, important decision, an important relationship -- particularly all boss relationships and boss ratings --for every job. And then there are many additional questions.

Competencies and Soft Skills

How many times have you seen people achieve the numbers but are such lousy leaders are mediocre team players that they're fired? Unfortunately, how people perform with respect to competences and soft skills is typically not measured systematically, and new hires are given vague feedback until they're let go. It's unfair to candidates and new hires comma and it results in costly mis-hires.

There are very different competences to be applied for different jobs. Keep in mind that to qualify overall as a Top Performer one doesn't need *all* the associated competences. At the same time, low performers can exhibit many of the key competences without bringing the "full package" to the table.

Phone Interview

This Phone interview can be done by almost any manager at your company. We are simply Making sure they can follow directions when joining the conference bridge, are on time, they read the job description. We are listening to their voice, do they sound professional, would you want this person trying to sell you something, and finally reading the brief statement below:

> *"Our company uses a very thorough selection process to ensure we hire only the best candidates. We perform a competency interview in which we ask about your entire career, all your successes, mistakes, key relationships. And finalists are asked to arrange personal reference calls with former managers. The benefits too high performers who apply are many. You'll go to work in a company with almost all high performers. Career opportunities with our company are usually good because so many high performers grow the company. 90% of people who join us are happy on the job even one year later in R rated high performer and within a couple of weeks of joining us find they Receive comprehensive coaching to help assimilate smoothly into our company. They perform very well and very quickly in our team begins formulating their Individual Development Plan."*

TORC Technique – Threat of Reference Check

This convinces potential new hires to reveal the whole truth because during the entire hiring process, the potential new hires will be informed that they will have to arrange personal reference calls with former bosses and others just prior to a job offer. This is a powerful truth serum, solving one of the biggest problems in hiring, and that is that under performers get away with portraying themselves, in their resume and interviews, as high performers. This must be made clear prior to the first interview, during the first interview and after the first interview (and any subsequent interviews to follow).

Career History Form

The online career history form is available to YSE clients. This form has the TORC technique truth serum in the instructions and ask for the usual application form information plus a lot more. It's a long form that candidates complete online, and when they click submit you will receive it via email. This job history form shows you crucial information such as dates and jobs titles, the candidate's full compensation history, accurate boss ratings, and true reasons for leaving each employer. This enables you to screen candidates in, and out, in seconds. This is the easiest, least expensive way to get started.

Interview Guide

The online interview guide is available to YSE clients. Interviewers will read the questions to the potential new hire, take notes, ask follow-up questions and turn the page when it's full. Ask the potential new hire to describe every job in chronological order and specifically to describe every success, failure, key decision and key relationship, including guesses as to how all bosses will rate them when you (the interviewers) call them. This interview should be face-to-face and take no less than one hour.

Two Interviewers

Adding a tandem interviewer facilitates a High Performers rating of 86% (one interviewer only yields about 50% High Performers rating). When 2 interviewers are used, managers like you achieve results almost as good as results Top grading professionals achieve. Two heads are way better than one.

Personal Reference Calls

Ask candidates to arrange personal reference calls with their former bosses. No excuses – high performers will convince them to participate. You and your tandem partner each call half of those references.

The Hiring Decision

Interviewers share notes, discuss their findings, consider all the information gleaned, and decide whether or not to extend a job offer.

How to Include Competencies in Job Scorecards

In the job scorecard, list the minimum acceptable rating a candidate must achieve on all competences to be hired and then color code them. The color coding is simple. Green is for relatively easy to change, through coaching, training, and experience. Red means very difficult to change, and yellow means hard but doable. We have provided the color ratings below based on our experience coaching and hiring hundreds of people.

Creating a Job Scorecard

You will need to create a separate job scorecard for each position on your sales team. First, you'll need to come up with a list of accountabilities for each using the job descriptions in the previous sections. Along with those accountabilities you will need to create a specific metric for your company. You will then use the below competencies listed and choose at least 15 that are important for that position in your specific organization. You will rate each of those competences:

5 = Excellent. 4= Very Good, 3= Good, 2= Only Fair, 1= Poor, N/A

During the Interview with each candidate, you will score each candidate for each competency with the above minimum acceptable rating. Choose your competencies below and enter them into your job scorecard for each position. Get feedback from other team members and managers while creating each job scorecard. This should be a team effort.

Red Competencies – Very Difficult to Change

Tenacity – Consistent reward of passionately striving to achieve results. Conveys strong need to win. Reputations for not giving up.

Intelligence – Ability to acquire understanding and absorb information rapidly. A quick study.

Analysis Skills – Identifies significant problems and opportunities. Analyzes problems and people in depth. Sorts the wheat from the chaff, determining the root cause.

Conceptual Ability – Deals effectively with not just concrete, tangible issues but with abstract, conceptual matters.

Creativity – Generates new approaches to problems or innovations to established best practices. Shows imagination.

Integrity – Ironclad. Does not ethically cut corners. Earns trust of co-workers. Puts organization above self-interest.

Assertiveness – Takes forceful stand on issues without being excessively abrasive.

Vision – Provides clear, credible vision and strategy.

Inspiring Followership – Inspires people to follow lead. Minimizes intimidation. Takes change. Motivates by pushing appropriate hot buttons of individuals.

Energy/Drive – Exhibits energy, strong desire to achieve, high dedication level, 60 hours or more per week probably necessary for results expected.

Enthusiasm/Passion – Exhibits dynamism, excitement, and a positive can-do attitude.

Ambition – Desires to grow in responsibility and authority.

Yellow Competencies – Challenging to Change

Change Leadership – Actively intervenes to create and energize positive change. Leads by example.

Conflict Management – Understands natural focus of conflict and acts to prevent or soften them. Effectively works through conflicts to optimize outcome. Does not suppress, ignore, or deny conflicts.

Compatibility of Needs – Needs that are consistent with opportunities in foreseeable future.

Balance in Life – Achieves sufficient balance among work, wellness, relationships, community involvement, professional associations, friendships, hobbies, and interests

Judgement/Decision Making – Consistent logic, rationality, and objectivity in decision making. Neither indecisive nor a hip shooter.

Strategic Skills – determines opportunities and threats through comprehensive analysis of current and future trends. Comprehends the big picture.

Pragmatism- Generates sensible, realistic, practical solutions to problems.

Track Record – Successful career history. Generally, earns performance ratings of Excellent.

Resourcefulness/Initiative – Passionately finds ways over, around, or through barriers to success. Achieves results despite lack of resources. Goes beyond the call of duty. Shows bias for action. A results-oriented "doer".

Excellence – Sets high stretch standards of performance for self and others. Low tolerance for mediocrity. High sense of responsibility.

Independence – Willingness to take independent stand. Not swayed by last person talked with.

Stress Management – Stable and poised under pressure

Adaptability – Not rigid. Copes effectively with complexity and changes.

Likability – Puts people at ease. Shows Emotional Intelligence. Warm, sensitive, compassionate. Not arrogant. Friendly, sense of humor, genuine.

Negotiation Skills – Achieves favorable outcomes in win/win negotiations

Persuasion – Persuasive in change efforts, selling a vision. Convincing.

Team Builder – Achieves cohesive, effective team spirit with staff. Treats staff fairly. Shares credit.

Green Competencies – Relatively Easy to Change

Risk Taking – Takes calculated risks, with generally favorable outcomes. Does not "bet" the farm.

Leading Edge – Constantly benchmarks best practices and expects other to do the same.

Education – Meets formal and informal educational requirements. Exhibits continuous learning.

Experience – Job-Specific

Organizational/Planning – Plans, organizes, schedules, and budgets in efficient, organized manner. Focuses on key priorities

Self-Awareness/Feedback – Recognizes own strengths and weaknesses. Not defensive. Does not rationalize mistakes or blame
others. Uses feedback mechanisms.

First Impression – Professional in demeanor. Creates favorable first impression – body language, eye contact, pasture, etc.

Customer Focus – Monitors client satisfaction (internal or external). Establishes partner relationship with clients. Visible & accessible to clients.

Team Player – Reaches out to peers. Overcomes we-they. Approachable. Leads peers to do what is best for company.

Communications – Oral – Communicates well one-on-one, in small groups, and public speaking. Fluent, quick on feet, command of language. Keeps people informed.

Communications – Written – Writes clear, precise, well-organized documents using appropriate vocabulary, grammar, and word usage.

Political Savvy – Aware of political factors and hidden agendas and acts effectively with that awareness.

Training/Development/Coaching – Actively and successfully trains people. Coaches and develops for promotion into positions where they succeed. People builder.

Goal Setting – Sets fair stretch goals for self and others. Encourages individual initiative.

Empowerment – Pushes decision making down to the lowest level. Provides authority and resources to subordinates.

Performance Management – Fosters high level of accountability through fair, hard hitting performance-management system. Free with deserved praise and recognition. Constructive in criticism. Provides frequent feedback.

Redeploying B/C Players – Redeploys chronic B/Cs

Diversity – Scores high on diversity

Running Meetings – Demonstrates ability to organize and run effective meetings.

Interview Guide

Education Years
Although we will spend most time on your career, and specifically your most recent jobs, this is a chronological interview, starting with your education years and coming forward to the present. Please describe:

- The schools attended (and dates), starting with your first school
- Grades
- Degrees awarded
- High and low points
- People who influenced you – your career interests, personality, and values; and
- Meaningful work experience during school years.

Note: For those with college experience, start with college. For those without college experience, start with high school.

Work History
Start with your first full-time job and come forward to your present job. For each job, please tell us

1. Why you took the job
2. About your successes and accomplishments (and how you achieved them)
3. About your mistakes and failures
4. What you liked most and least about the job
5. (for management job) how many A, B, and C Player direct reports you had when you entered the job and at its end; and what happened to change the talent mix – hiring, firing, coaching, etc.
6. The name of your supervisor, and that supervisor's strengths and weaker points
7. Whether you agree to arrange reference calls for us. Please note that to receive a job offer, we may ask you to arrange reference calls with supervisors you've had in the past 10 years. Give us your best guess as to what that supervisor would say were your strengths, weaker points, and overall performance
8. The reason(s) you left that job.

Self-Appraisal
Please list your strengths and weaknesses, in detail.

Future
What are your goals for your next job? What are your long-term career plans and goals?

Onboarding and Training

Preparing Your Sales Team for Success

"Any investment in sales training is an investment in your own gross profits."

— Roy H. Williams

Example Sales Training Roadmap

Day 1

Orientation

_____The [Your Company Name] Way
_____Employee Handbook
_____Tour
_____ Lunch with Employee
_____Employee Forms
_____Computer Intro
_____Meet with Supervisor

Day 2-14

<u>Training Sessions: Please mark when completed</u>

_____ Basic Network Training with COO

_____ CRM Overview with Sales Manager

_____ Shadow Purchasing Coordinator. Learn how to:

- Request quotes
  - Display how to create a quote from an opportunity
- Orders Board ticket flow –
  - Statuses
- Intro to Quoting Application
- Put together a sample server quote, and update back to opportunity
- Provide an example of a won opportunity converting into a sales order
- Explain the procurement screen
- Show how a service ticket is created from a sales order
- Explain email reminders on Orders Board

_____ Backup Training with COO
_____ Shadow Service Engineer

- Review daily process for checks
  - Identify what happens if a problem is found
- Show tickets and spreadsheets for tracking
- Include the backup review process
- Show Maintenance board and explain its function
- Purpose of doing proactive maintenance
- What are we doing for proactive maintenance?
- What tools do we use and the pros/cons of each?
- What are the results of doing proactive maintenance – what do we measure?
- What other tools exist in the market?

- Review monthly client reports so salespeople can interpret them to clients if needed
- What metrics do we look at internally?

_____HR Manager Meeting

- Hiring Practices
- Timesheet Approvals
- Engineer Training
- Password Management Application – Review Password Manager policies/procedures
- Customer Service Goals & Objectives – Review these again from a technical support standpoint
- Service Plans – Review the major service plans that we provide our clients

_____ Shadow Account Coordinator

Review vendor matrix (including vendor partner referrals and MDF)

- Strategic business reviews, scheduling and primary components
- Best Practices Report
- Roadmap
- Account Management Board and statuses and assigning resources
- Converting an opportunity to a sales order
- Requesting support from tech support for a client

_____VoIP Training

- Review different phone systems available
- Benefit of hosted VoIP
- Features and benefits of phone system
- Quoting process
- Discovery Meeting Questions
- Using the portal
- Using phone app

_____O365 Training

- Teams
- Sharepoint
- OneDrive
- Scheduling Meetings (Meeting Rooms, etc.)

_____ Shadow Help Desk Engineer

- Talk about activities for that day
- Walk thru the call process
- Show configurations and how you use the,
  - Talk about documentation process
  - Tracking time in CRM
  - Discuss the typical calls Help Desk gets
    - Escalation Process
    - SLA

_____ Shadow Service Coordinator

- Managed Service Billing
- Prioritizing tickets

- Engineer Utilization

_____ Shadow a Lead Engineer On-Site
- On-site clients' visits
- Remote support work
- CRM Notes and Time Keeping

_____ Shadow Marketing Coordinator
- Review Annual Marketing Plan
- Newsletter
- Email Blasts
- Seminars/Webinars
- Website
- Online Ads
- Pre-qualifying a lead
- Lead tracking
  - How to track
  - Where to save
- Referral Campaign
- Network Events
  - Meeting Room Rentals
  - Staff Development
- Other Direct Marketing
  - Direct Mail
  - Events
- [YOUR BUSINESS]'s Target Market
  - Messaging
  - Pain Points
  - Typical Client Persona

_____ "The Value of Managed Services" Training
_____ Managed Services Offerings
_____ Competition Overview

_____ Community Outreach/Company Events
- Charities
- Happy Hour/Company Events
- Welcome Slides/Guests

_____ Attend Sales Meeting

Department Meeting after 15 Days of Hire

Each department head (or person in charge of shadowing the new employee) will need to meet 15-20 days after the new hire start date. They will discuss how the new hire performed in each shadow session. Each department will vote (either yes or no) to keep the new hire onboard as an employee. Each department member will need to justify specific reasons for a "no" and argue their point to other members. At the end of this meeting, a yes or no will be determined and discussed with the new hire.

New Hire LinkedIn Setup

It's important to set your new salespeople up quickly (and correctly) so they can begin prospecting right away.

Settings - Go into LinkedIn settings, and disable notifications to your network. Do this after logging in by navigating to account/settings and privacy/privacy/sharing profile edits/select "no". This is important because you will be making many changes within your profile, and you don't want to bombard your network or give the wrong impression that you are updating your profile because you are looking for another job.

Photo - Ensure that your photo is professionally friendly head and shoulders close-up. It needs to be in focus and well lit. Always avoid high-contrast bright backgrounds. Also avoid Zoolander Blue Steel look, glamour shots, power pics, wedding shots, mug shots, sporting shots, trophy shots, and pictures taken more than five years ago. People form an opinion within a second, and your photo and headline is what will most influence them. Never hide your photo from people viewing your profile: Check LinkedIn settings under Account/Settings and privacy/Basics/Showing Profile photos/select Everyone.

Headline - Instead of your title and company, have a headline under your name that describes what you do for customers or those whom you serve. What is the difference you make for clients? Avoid passive words such as helping, seeking, enabling, etc. Instead, make a positive statement such as "Transforming customer experience for clients" or "Placing customers at the heart of strategy and systems" or "Creating memorable events that deliver results" Your headline should describe the results you create for your customers, but not in a way that makes you look like a complete tool. Avoid clichés, acronyms, and over-the-top phrases.

URL - Personalize and shorten your LinkedIn link (the URL that takes people to your profile). View your profile page by clicking on the small thumbnail of your photo in the upper right, then on the right side of the screen as you begin to scroll down, select Contact and personal info, then click on the small pencil icon, then click again on your LinkedIn URL. Then change to something that is not already taken by another member with your name. Don't forget to save, and this link should be included in your email signature.

Contact Details - Complete your contact details. If you are in sales, forget privacy, and instead make it easy for people to contact you. Whenever you change employers, always remember to update the website links. View your profile page by clicking on the small thumbnail of your photo in the upper right, then on the right side of the screen as you begin to scroll down select Contact and personal info, then update details as appropriate.

Summary Panel - Create a summary that describes the business value you deliver and the value by which you operate. Write it in the first person, and neither be too over-the-top nor hide your light under a bushel. This is where people can get a sense of what you believe and how you operate. This starts to create trust and set the agenda on value even before a single word has been spoken. Your summary can potentially start with "I believe…" and then go on to talk about your vision for your customers. There are two types of content that can be created within your LinkedIn profile:

1. Posts (updates) are short and often for the purpose of sharing other people's content, which is relevant to your audience or customers. This is where you need to subscribe to a content-sharing tool such as Buffer, which has a plug-in for your browser, it makes the process of capturing content and scheduling it for publication on your social media extremely easy.
2. Original articles (blogs) may be shared. They are typically more than 400 words and embedded with images or videos.

Ask your customers "Where do you go online to stay up-to-date?" or "Who do you follow as a leader in your industry"? Then find those people online, subscribe to their blog, RSS feed, configure Google Alert for their name, and follow them on Twitter.

If you have fewer than 500 connections in LinkedIn, then your profile highlights that fact, and you look weak. Your first goal is to build more than 500 connections, but don't stop there. You need a minimum of 5,000 LinkedIn connections because networks are built on nodes, and sellers with 5,000 + connections on LinkedIn have a 98 percent likelihood of hitting quota.

Never ask to connect using the generic message that LinkedIn generates. Always tailor your request by writing something like "I was talking with Mary Jones recently, and she mentioned your name. Good to connect here on LinkedIn, and congratulations on your career!" or "I really enjoyed reading the article you published, and great to also connect with you here on LinkedIn" The golden rules for connection are don't sell and don't ask for anything; just request to connect and provide context so they are likely to accept.

Using LinkedIn Navigator to Begin Networking/Prospecting

Step 1: Take an account list of no greater than 50 accounts and add it on Sales Navigator.

Step 2: Save five to seven prospects per account as leads because you are going to monitor the content they share and where they are mentioned plus interact with this content.

Step 3: Build a robust Sales Navigator feed that you'll utilize in both web and mobile streams. This is a Custom Feed.

Step 4: Sort by Lead Shares and start to comment on what they're sharing in a thoughtful way. Remember, you're not connected to these people, so it's a wow factor for CXOs to have some total stranger commenting in a relevant way out of the blue! Contacts that share based on the 90, 9, and 1 Internet theory of presumption are massively valuable. Basically, only 1 percent write, 9 percent share, and the other 90 percent are more voyeurs on the web. If someone is sharing, call them.

Step 5: You need to set aside time to mine your potential referrals per account. Your goal is to call colleagues who are connected into prospect companies. All these connections should be exploited so you never cold call again.

Step 6: Set aside time to explore all your first- and second-degree referral sources into prospect organizations. These are represented in Navigator, and you can click to expand them and look for patterns that emerge in the common connections. This will reveal competitive salespeople in other vendor companies or nods on the network. Nodes can be industry thought leaders or well-connected influencers. Mapping the connections to the power base is a heat-seeking-missile way to reach the right decision-maker.

Call up sellers in affiliated vendors that are harmonious to what you sell, and cohost networking events with them to overlap your networks. The cardinal rule of referral selling on LinkedIn is not to do it digitally. When you identify the connection in common, call that connection and offer to ghostwrite a message they can pass along to make the warm introduction. Make it frictionless. B2B buyers are five times more likely to engage when the outreach is through a mutual connection.

Step 7: Watch the daily email digest from Navigator for job changes. When you are going after a calling list, start to call down the Navigator Newsfeed, which shows new mentions, job changes, lead recommendations, and other triggers like funding or innovation projects. Use the Navigator real-time feed as the bedrock for your COMBO (call, voicemail, and email – back to back in less than two minutes).

Step 8: Don't exceed 50 target accounts and up to seven contacts per account. This means you should only ever be monitoring 300 objects, which is double the Dunbar number of 150. The neocortex can hold only 150 connections. Sales Navigator gets

unwieldy, and you start to miss information if you follow too many people or accounts. You should have 50 key target accounts per quarter max, five to seven leads per prospect, and at least one C-Level per account. You can easily purge out accounts and leads if you track too many. Work clean and keep it organized and tight.

Using the Language of Leaders in Sales

When selling at the CEO or CIO level, you need to speak the language of leadership. This includes two important points:

1. Discuss how you can deliver business outcomes and manage their risks.
2. Talk about the numbers and the business case, plus how success will be measured.

This is the essence of leading with why the conversation matters, and it focusses on the business outcomes they care about. That's really what leaders want. If you can also learn to speak the language of numbers, then you can start to become a trusted adviser. This allows you to work with your client in partnership, rather than being perceived as someone who's merely attempting to sell. Every seller needs to do these three things:

1. Lead with insight and engage by having a perspective on the client's world.
2. Build trust beyond mere rapport, with relentless positive intent and business literacy.
3. Create value in every conversation, backed up with real evidence.

Ten Rules to honor on your quest to engage a C-Level:

1. Be a person of value, a domain expert who can help make things happen. No one likes being sold to, but people do value relevant information, insight, and perspective from someone with humble wisdom, a strong network, and gravitas to carry the conversation.
2. Start at the end and lead with why. Get to the point and be concise. Genuine insights are rare and never cliched, so do your homework and understand why the conversation is important. Only once you've anchored the conversation should you talk about the what, how, who, and when.
3. Open powerfully by not talking about yourself; make it all about them. Show that you've done your homework and that you understand how you can help deliver their agenda, solve their problems, or realize their opportunities – both personally and professionally.
4. Speak the language of business: delivering financial results and achieving KPIs.
5. Speak the language of legacy; enacting sustainable change that makes a difference in the lives of customers, staff, and the community.
6. No faking it. Know the industry and have evidence to support your assertions. Be masterful at telling powerful true stories but be conservative in your claims. Also be honest and transparent. If you don't know, then say so.
7. Speak the language of leadership: finding positive outcomes and managing risk.
8. Always be early, have an agenda, respect time, and follow up in writing. In short, be professional.
9. Let them be in control. Simply ask them what they want to see happen after the meeting and what the next step should be to create progress. But when they sponsor you down, always maintain your direct relationship and the right to contact them whenever necessary. People are best motivated by reasons they themselves discover. Never preach, sell, or lecture. Instead ask insightful open questions that cause them self-reflection.
10. Always deliver on every promise, have integrity, and be rock-solid reliable.

Leading with the relationship sell or pitch is therefore a giant mistake. Instead, lead with insight and value in the very first conversation and build a meaningful relationship of trust over time.

The language of business is numbers, not words, so always ask yourself: How does this benefit drop to their bottom line or improve their balance sheet?

The reality is that you only have 20-40 seconds to create the right impression and hook the interest of the person with whom you are seeking to engage. To succeed, you must focus on why a conversation matters rather than lead with what you do and how you do it. The what and how are irrelevant until they first know why they should invest time in talking with you. By focusing on why a conversation matters, we overcome the worst competitor – the option of merely doing nothing.

What's the business problem I can solve for the client, and why should that be a priority for them? Then ask: How do I create compelling business case value better than anybody else? And finally: How can I lead with insight to create value in a conversation? The answer to this last question is to have a conversation with a senior person Think about this fact validated by CEB Research: The way we sell (engage) is more important than what we sell (our product, service, or solution). CEB Research surveyed 5,000 buyers and discovered that 53 percent of a competitive selection is based upon the experience the seller creates for the buyer. Price or value contribute a mere 9 percent to the buying decision, and brand, product, and service capabilities together contribute 38 percent.

Often after briefly introducing you with some context (common connection, trigger event, etc.). "The reason I am calling is that I work with others in your industry and I've done some research on your company. I think you may have the opportunity to achieve (nominate a specific business outcome you typically deliver). I think it's important because (cite industry trend), and I'd like to share some of my findings with you and discuss how you could potentially improve results. How is Thursday of next week?"

Prospect Hunting

- Research by Craig Elias states that executives new to the job who spend $1 million + on new initiatives did so within the first 90 days of the job. Therefore, job changes are a key trigger to monitor.
- The number one problem for salespeople across the globe is lack of sales pipeline – yet that's a symptom rather than a root cause. The real problem is an aversion to using the right combinations of intelligent activities that are required for sales success.
- Useful tools: Local Business Journal, Book of Lists
- Tools matter. The better our sales assets, the more confidently we head into the field. Every salesperson must be equipped with the necessary tools and then become proficient at using them. Salespeople not properly equipped for the inevitable conversations are less likely to engage with prospects. And those who are equipped but ineffective at using these tools will either fumble completely or not get noticed when they do engage. The world is full of poorly equipped sales reps who are reluctant to engage prospects because they don't know what to do. And then there are the ineffective reps who are willing to pull the trigger but consistently take terrible shot after terrible shot; their feeble attempts fail to score a direct it or move the sales process forward. Reluctant and ineffective are not words we want describing our sales effort.

Sales assets include:

- Our Sales Story – The story is foundational to everything we do in sales, and we use bits and pieces of it in all our weapons.
- Networking
- Social Media
- E-Mail
- The Proactive Telephone Call
- Voicemail
- Traditional Printed Marketing Materials
- Digital Marketing Tools: Blogs, Podcasts, Online Videos (YouTube), and Webinars
- White Papers and Industry Experts
- The Initial Face-to-Face Sales Call
- Probing Questions
- Case Studies
- Samples and Demos
- Tradeshows
- Facility Tours
- Team Selling
- Entertainment
- Presentations
- Proposals
- References

Interviewing Existing Clients

A way to build a quality sales pipeline: interview your most successful clients to find out what happened inside their organization that led them down the path to buying your solution. Dig deep to discover:

- What trigger events should you listen for?
- What problems should you be looking for?
- What does a dream potential client really look like?

Individual Business/Sales Plan

Salespeople need to write their individual sales/business plan each year. The individual business plans come in all shapes and sizes, but there are five key components to ask salespeople to include in any plan:

9. Goals – What You Are Going to Achieve. It is important to start with the end in mind. The plan should declare personal goals for the year. Here are some possible categories for which a salesperson would provide specific goals:

    a. Total revenue dollars
    b. Gross profit (dollars or percentage)
    c. Number of new accounts acquired
    d. Net new business dollars

e. Revenue dollars from existing accounts
f. Product category, cross-sell, or new product goals
g. Major goals for specific named accounts
h. Personal income goals (obviously a private objective, but many money-motivated reps are driven to hit certain income targets and find it very helpful to write them down and monitor progress throughout the year)

10. Strategies – How You Are Going to Do It. The goals are the "what" and the strategies are the "how". This is the place to spell out how you plan to attack the market and where the business is going to come from. For instance:

    i. Are there certain existing accounts where you plan on investing extra energy? Some reps provide lists of focus accounts (i.e., largest, most growable) for the year.
    j. Which geographies, vertical industries, or channels will you pursue? Do you have a focused, finite target prospect list to attach to the plan?
    k. What major cross-sell opportunities exist within existing accounts?
    l. How will you approach new accounts? What will you do to get in the door and how will you move opportunities forward?
    m. What other strategies or tools will you use (e.g., team selling, events, referral sources, social media connections) to achieve your sales goals?

11. Actions – Specific Sales Activities You Will Commit To. List key activity metrics you will measure, monitor, and hold yourself accountable to reach. Example might include:

    n. Number of hours' time-blocked and committed to proactive new business development
    o. Number of outbound calls, number or meaningful conversations, number of face-to-face sales calls
    p. Number of trips to key markets, number of major presentations, number of facility tours or client's visits.

12. Obstacles – What's in the Way? Failure is not an option and we don't believe in excuses. I'm of the mindset that if there are obstacles in your way that will prevent you from achieving your goals, you probably know what they are right now. Put them on the table so that you can be addressed and ask for help or assistance in areas where you need it. Possible obstacles may include:

    q. Product knowledge
    r. Sales Support
    s. Lack of technology
    t. Distractions of the company's anti-sales department
    u. Current account management and customer service burdens
    v. Personal health or family issues
    w.

13. Personal Development – How You Plan to Grow This Year. What are the areas you would like to develop to increase your skills, become more efficient, or further your career? Your options may include:

    x. Seminars and conferences to attend
    y. Books and blogs to read
    z. Specific industry training you desire
    aa. Expending your writing skills, social media involvement, or association memberships
    bb. Peer coaching or seeking out a mentor

Our Sales Process

Turning Leads into Contracts

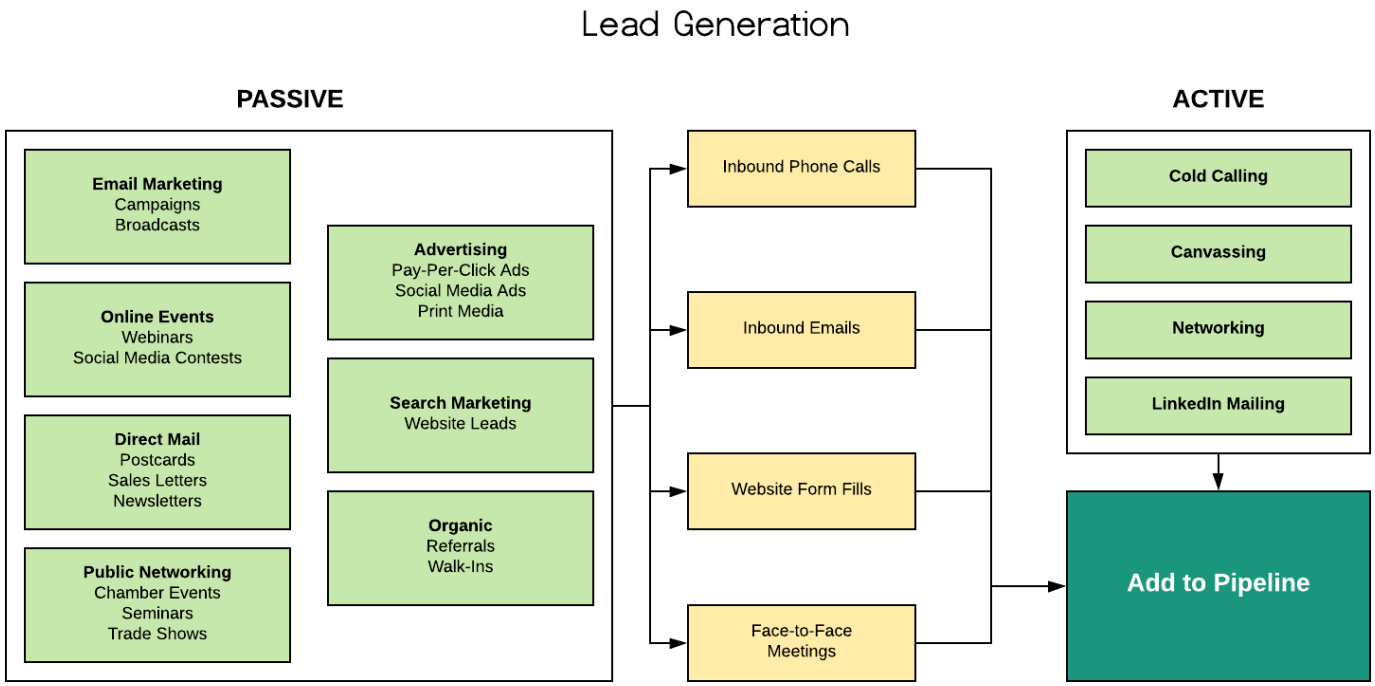
"Motivation will almost always beat mere talent."

- Norman Ralph Augustine

Example Lead Generation Flow

An MSP typically uses multiple methods of lead generation to provide our sales team with opportunities. There are several ways that a lead may enter their sales process, including (but not limited to):

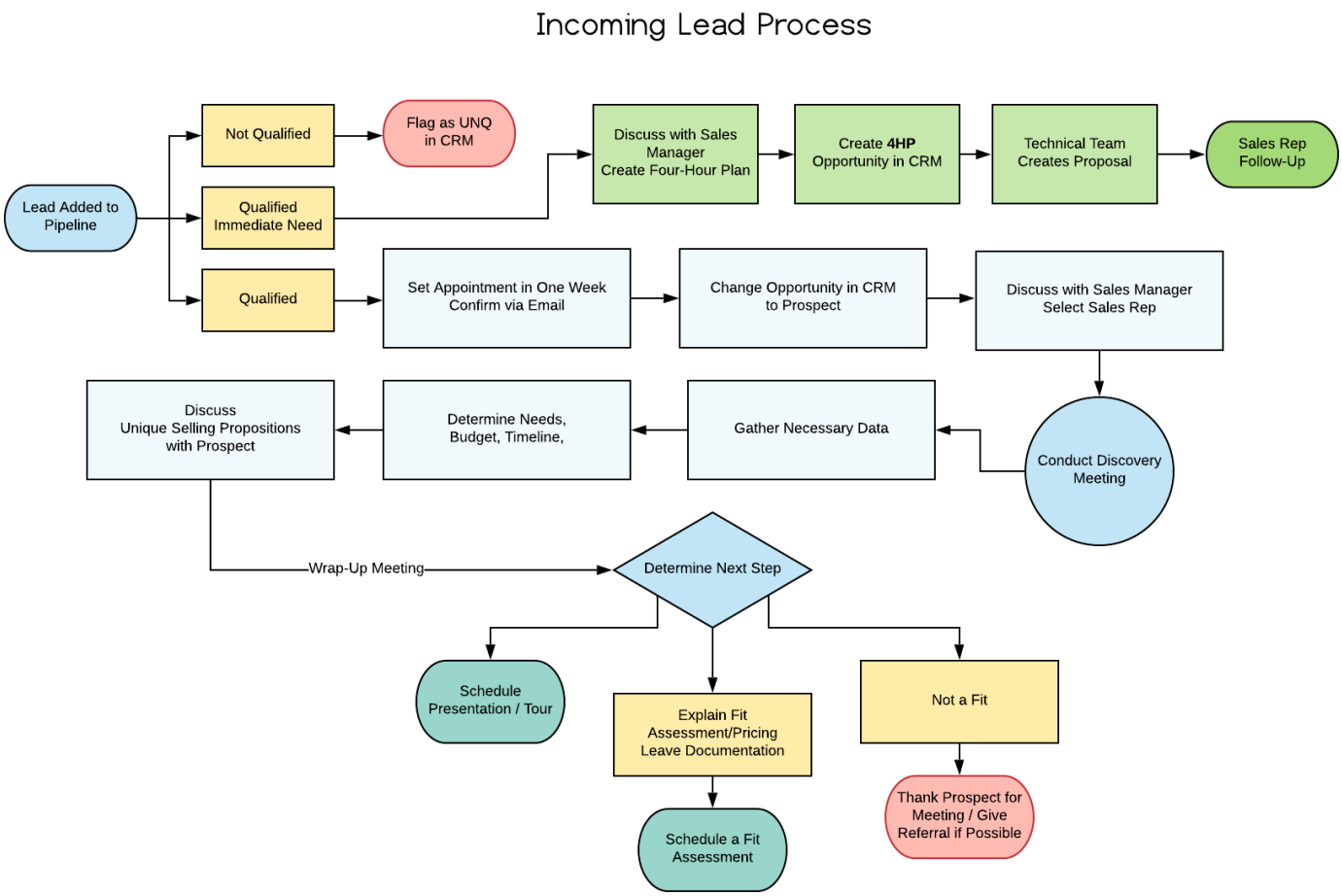
1. Email marketing
2. Website leads
3. Telemarketing
4. Referrals
5. Existing customers
6. Personal cold/warm call



Example Sales Process Flow

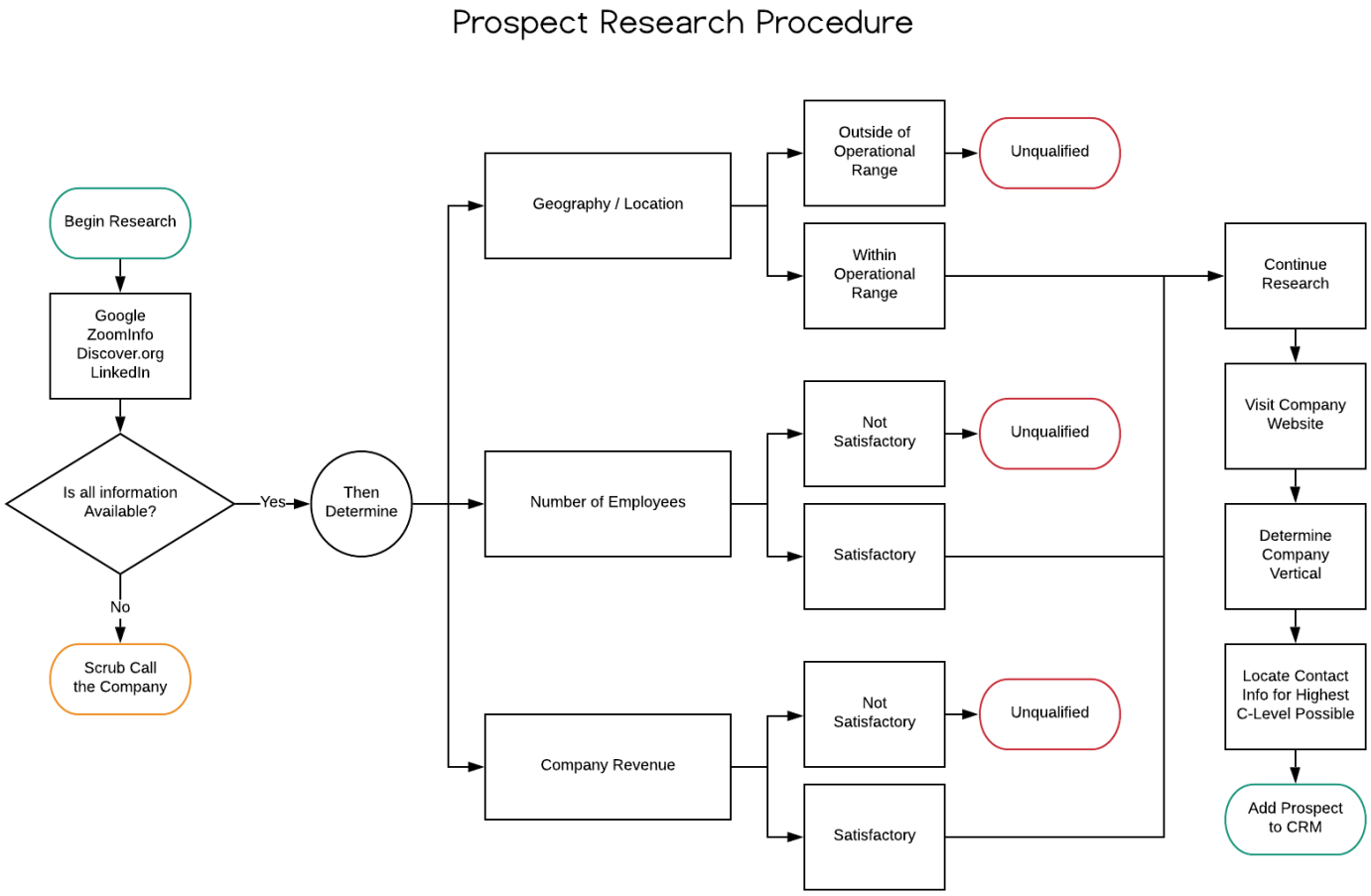
Below is a general overview of the typical MSP sales process:

Stage 1 – Discovery Meeting / Technical Discovery
Stage 2 - Presentation Meeting
Stage 3 – Decision Making
Stage 4 – Master Service Agreement and Scope of Work / Contract



Proper qualifying is essential to a smooth sales process.

Example Prospecting Flow



Focus on developing a relationship with prospects and understanding their needs.

Prospecting is focused on getting the customer through the first two stages of the sales cycle: Attention and Interest. The end goal is getting a potential customer to say, “Yes, I want to learn more.” That's important to remember, because as soon as you start talking to the prospect about products, you’ve jumped past the first two stages and are already working on the third stage, Desire. When you're positioned as just trying to push product, you miss out on the opportunity to become a trusted advisor, which can lead to greater sales. Focus on developing a relationship with prospects and understanding their needs.

Discovery Meeting & Technical Discovery

The foundation of our sales process and the first milestone on the road to be a top sales professional is proficiency at executing Discovery Meetings. Discovery Meetings help us to make the prospect aware of our organization and to begin the process of developing a relationship. Relationship development takes time but if a prospective customer is accepting a meeting, then there is some reason behind them accepting the meeting.

The prospective customer is choosing to spend time out of their busy day to meet you and to express some pain that they are experiencing. They are asking for help. It is YOUR responsibility to ask quality questions to uncover the pain, uncover the reason this prospect chose to meet with you and keep digging until you understand the impact to the business in some quantifiable measurement.

This information will be key to enable you to move the process along and engage the prospect to remind them WHY they connected with you in the first place. Later in the sales process you will appreciate the information you gathered here to give you reasons to follow up with the prospect other than "touching base." There will be more on this topic later but know that you do not need to understand technology to ask quality questions. Be inquisitive and genuinely interested in learning about the prospect to understand their business and the current pain they have – which is WHY you are sitting in front of them.

The other half of the Discovery Meeting is to qualify the prospect regarding how they align with our business philosophy, the type of customers we are a good fit to serve AND if you would be interested in working with this person. The Discovery Meeting is about laying the foundation to the relationship to find reasons why we should or should NOT take any further steps together. We do want to give a summary of what services we offer however this meeting is about the prospect not us. At the end of this meeting we should have enough understanding to see if we want to move ahead with any follow up, next steps, network evaluation or to agree that we are not a good fit now and move on. It is ok to move on. Your commodity is time and if you feel they are not a quality prospect that is a good fit for our business then do not spend any more time than necessary with them.

There will be Discovery Meeting training wherein you will shadow the other sales team members to learn the different styles as well as there is a Discovery Meeting Script that outlines that we recommend that you follow during all Discovery Meeting engagements.

Discovery Meeting Preparation

Before jumping out of the car to call on a significant account, you should be able to answer two key questions:

"What is a win for you at the end of the meeting?"
"What is my plan for the meeting?"

New business development success results from creating a sales dialogue, not perfecting a monologue. One of our sales laws is that discovery always precedes presentation. Always. It's sales malpractice when it doesn't. Pitchmen and product-pushers present before they fully understand the customer's situation. Consultative sales professionals gather information, connect with the prospect, and begin building a relationship before presenting solutions.

Sitting at the Table

Don't sit across from a prospect. It can be awkward to sit down next to the person, especially when it's only the two of you at a rectangular table. So, sit perpendicular to the buyer at a ninety-degree angle. At a round table, you can absolutely sit down

next to someone without it being awkward. Before sitting down, especially in a very large room, take a second to decide the best way to physically communicate that you are there as an ally, not an adversary.

Phases of a Winning Sales Call

1. Build rapport and identify the buyer's style
2. Share the agenda (get buy-in, seek input)
3. Clean up their issues (only with existing clients)
4. Deliver the power statement (three minutes maximum)
5. Ask probing questions (also known as discovery)
6. Close
7. Determine the fit and seek out objection
8. Define and schedule the next steps

Questions that Qualify and Set the Agenda – rather than leading with a pitch, you must instead lead to the business value you offer. This is important because people are best motivated for reasons that they themselves discover. An open question forces the other person to engage in meaningful conversation.

Closed: Is that a serious problem for you?
Open: How does that impact the business and you personally?

Closed: When can you sign the paperwork?
Open: What's your timing and process for being able to go ahead with this?

Closed: If we could do that, would you buy from us?
Open: If we could do that, how would that change things for you?

There are two types of questions that sellers need to ask if they are to build quality sales pipeline. These are qualification question and discovery questions.

The best salespeople combine qualification and discovery to build understanding and trust, and to drive progression through the sales journey. Here are some open questions for digging deeper in a way that encourages the prospective client to engage with you to build a mutual trust and understanding:

- I've done my homework, but there are some questions I think only you can answer – may we cover a few of these now?
- What's really driving the need to make this kind of investment?
- You're very busy and have lots of people seeking meetings with you, so why did you agree to meet with me today?
- What must be delivered in terms of business outcomes?
- Where do you see the risks?
- What is your process and timing for having a solution in place?
- What other options are you considering? Why are these attractive?
- What happened inside your organization that caused you to look at investing in this area?
- What's the business case for making the investment and changing the way things currently operate?
- Who's impacted internally and who else needs to be onboard before you can go ahead?
- How is the project being funded and, beyond budget, what sort of funding is already secured?

- When does this need to be implemented and delivering results?
- Why is that date important and what happens if it slips?

The Power of Truly Listening – Listening is the most powerful form of influence. It draws the other person toward you, it shows them you believe they are the most important person in the conversation, it builds empathy, it demonstrates your values and positive intent, it earns you the right to ask questions, and it helps them believe that you understand them and what they need. The top 10 percent of performers spoke only one-third as much as the bottom 90 percent.

Lead with strong financial results that will be achieved and have proof of why the numbers are valid, how progress will be measured, and how risks will be managed. Here are some examples of compelling business case drivers that feed directly into bottom-line profit.

First Meeting Objectives & Questions

The conversation should go in order of the script listed below; however, this script is designed to address the different components of information we are seeking to obtain in the Discovery Meeting. If you do not get all the information you need in this meeting – which is ok - then part of your follow up plan with this prospect (presuming that you deem them qualified) will be to obtain the additional information.

Upfront Personal Contract:
Thanks so much for meeting with me. There's a series of questions I would like to ask you to understand how you use technology in your business. This process will allow me to see how we can potentially add value to your business. If we can add value, I will give you some ideas and if interested we can proceed to next steps which would be scheduling either a technical discovery or a presentation. If not, then I will let you know that too. Ready to get started? Great, I want to learn how technology plays a role in each department.

Section I. Sales and Marketing Background

-How do you find your prospects; how do they find you?

-Once the lead comes in, where does the info get entered?

-Do you use a CRM System?

-Is it on prem or in the cloud?

-Do you have internal meetings where people connect in remotely?

-What technology are you using for that?

-What kind of phone system do you have?

-Do you email each other?

-Where is your email hosted on your server?
-Or with someone else?
-O365?

-Would you like to see any process improvements in any of your departments?

-How many years has the company been in business now?

-Number of locations? Better/best/worst location-need any extra help?

-Number of Employees?
-Number of PCs? Laptops?
-Number of Servers? On premise? Data Center?

-Products and Services offered?

-How have the last 12 months been going?

-New Industry trends we should know about?

-What's the strength of the business right now?

-How are you perceived in the marketplace?

-Annual sales amount for last year?

-Who is the Ideal Customer?

-Any Seasonal Customer Difference? Down times?
-How many customers per week/month do you see?

-What is your average dollar amount Sale?

-Have you seen/heard of anything from a competitor on how they are currently using technology that you wish you had?

-Do your clients have a process that steals market share from you?

-What are the major reason(s) people give you for NOT buying?

-Do your clients come to the office for meetings?

-Do you ever find your customers have issues with your technology? Phones? Emails? File sharing?

-Is anything going to be different in the next 12 months?

-Any New Lines, products, services, hardware, software on the horizon?

Section II: Operations Background

-Take me through the process once something is sold.

-What line of business application are you using the place the order?

-As the product is being delivered, where are the notes kept.
    -Is that hosted on your server or in the cloud?

-How is shipping done? How do you currently backup the servers?

Section III : Finance

-What software do you use to invoice your clients?

-What accounting package do you use?
    -Is it in the cloud or on your server?

-Do you see any process improvements needed in the way the finance department works?

Section IV: HR

-Do your employees work remotely?

-How many?

-What is the process for connecting remotely?

    -If the remote employee has trouble connecting, what is the process for them to get help?
-Do your employees use mobile devices to connect?

-Do you use tablets?

-Is there any other software your employees use?

Are they in the cloud or on your servers?

Section V: Security

-What was the total dollars spent on IT in the last 12 months?

-Was that Paid to IT vendor? -In-House Staff?

-Internal resources hours working on IT issues?

-Unplanned Hardware repair or upgrades?

-Do You Plan on a hardware or software upgrade?

-Is your back up onsite and offsite?

-Do you know what you are currently using for a Firewall?

-Have you had any virus outbreaks?

-Ransomware, data theft?

-What antivirus do you use?

-How is your network security currently being managed?

-Who reviews the logs?

-How are security patches vetted then applied to the computers and servers?

Section VI: Moving forward:

-How are you determining the ideal timing for change?

-What other options have you previously considered?

-Are there any competing priorities going on now that would affect an IT vendor change?

Ask prospect: Now, knowing everything that we have just learned today, if there was ONE thing that [YOUR BUSINESS NAME] could do for your business, what would that one thing be?

Decision Making

- Set expectations to embrace or reject proposal within 2 weeks (up front contract)
- Position advocacy if possible, 3rd party "end of quarter incentives" (reference Dos and Don'ts)
- "Buying" and engagement questions
- Define any grey or outlying areas
- RFP and/or post presentation follow up

Objections

We don't see any reason to change.

- Articles on relevant industry trends, fresh ways of looking at traditional problems.
- White papers on challenges facing organizations today, future forecasts, or emerging business models
- Assessment tools to determine if costly problems or missed opportunities exist
- Interviews with industry experts and thought leaders

We're not sure if it's worth it

- Case studies featuring clients before/after scenarios
- Whitepapers on the business case for change
- Benchmark tools to enable comparisons
- ROI, total cost of ownership, and payback analysis tools to determine value in making a change

We can't figure out how it would work here.

- Examples of how other customers use your products or services
- Demonstrations to offer initial proof of concept

We're concerned it would impact how we're currently doing things.

- Map of steps involved in process detailing decisions to be made, who needs to be involved, and choice points
- List of key factors to consider in making the change
- Conversations with others who have gone through change process
- Lessons learned and tricks of the trade

Is this for real? Are others doing it?

- Papers or studies by industry experts and analysis regarding importance of change in today's business climate
- Video testimonials of customers detailing the value they've received

We're struggling to get buy-in.

- List of tough questions that need to be addressed by group moving a head
- Peer-level meetings with teams from your organization and your prospects
- Interview with individual leading the change initiative in a similar company

Reasons Prospects Go Cold

More often than not, deals go cold when you're blindsided by some factor you didn't discovery earlier in the process. It's unlikely you can learn everything you need to during the initial sales call, but it certainly helps to go into that meeting with a clear handle on the factors you want to discover, namely:

- Decision authority and decision influencers
- Timelines
- Available dollars or budget

- Willingness to make a change
- Stage in the buying process
- Decision criteria (how the decision will be made, not who makes it)
- Alternative options
- Competition

Example Questions to get those Answers are as follows:

- Along with yourself, who else really cares about this issue?
- Where are you in the process of evaluating options?
- Where will the money come from to fund this initiative?
- This is a significant decision. How committed are you to making a change? What is the likelihood that you will leave your current supplier (or solution) or change direction?
- Tell me the criteria you'll use to make your decision. How will you decide?
- What other alternatives are on the table?

Deals go dark when you get lazy and shoot from the dark.

Stage 4 – YES! Needs Paperwork

Signed Master Service Agreement (MSA) authorized and countersigned
Signed Managed Service Proposal (MSP) authorized and countersigned
Line of Credit Application authorized
ACH Authorization authorized
Extension of Net Terms authorized
Win/Opportunity in CRM and quoting tool

All binding legal agreements need to be authorized by an executive officer of the company and counter authorized by a [YOUR BUSINESS NAME] executive.

Sales Tools at your Disposal

Prospect Office Tour

- Inform Sales and Marketing Manager, Staff (send out staff email) that prospect will be visiting

- What to point out
  - OPS team
  - Key Performance Indicator panel
  - Testimonial Boards
  - Managed Services (NOC Team)

Follow-up Meeting Techniques

- Leverage information found in Discovery meeting
- Follow Up Customized Video
- Sit on the same side of the table as the customer
- Talk about networking and marketing successes
- Applicable articles, videos of potential interest to the prospect.

Target Customer Demographics

- Size
- Activities
- Tracks
- Opportunities
  - Sales Stages
  - Quote
- Campaigns

Growing Our Sales Funnel

List Generation/Maintenance

This is an important piece of our growth. It adds new, qualified businesses to the top of our sales funnel as potential clients we should reach out to. These businesses will receive mailers, emails or even "drop ins" if we're in the neighborhood. We want our marketing to go to the right businesses, and the right person at that business. It also weeds out those businesses that don't qualify as ideal candidates for [YOUR BUSINESS NAME] services. We don't want to waste marketing dollars on the wrong businesses! List Generation/Maintenance is often referred to as "Scrubbing" our lists or database.

Instructions for Scrubbing a List

These are listed in order of effective sites for lead research.

1. Use **www.Google.com**
    - Type the business name in the Google search box
    - Note the mailing address that comes up with the business to be sure it's within 25 miles of [LOCATION]
      - if YES: continue search
      - if NO: change the company type in CW to "Unqualified – Too Far"
    - Note if they have a website
      - YES: click to open their website
      - NO: go on to instruction #2
    - Click around on their website, looking for the following information:
    - number of employees, C-Level person like the President or CEO, their email address
      OVER 10: keep stalking
      Under 10: change the company type in CW to "Unqualified – Too Small"

2. Use **www.Linkedin.com**
    - Log in, use search bar at the top to find "company"
    - Type in the company's name, click on the company if it appears
      -note address to confirm it's the right business
      -note employee count (1-10 is Unqualified-too small, 11-50 is a Prospect, 51-100 a Prospect, 100-250 a Prospect. 250+ is considered Unqualified-Corporate IT)
      -note revenue (needs to be above 2 Million to be a prospect)
    - Find the CEO/President or highest C-Level possible

3. If none of these searches produce the information needed to qualify the business as a prospect, or unqualify the business as Too small, Corporate IT, etc., then a phone call must be made to the company. If scrub calling is part of your job description, a specific script must be used for this call. See your supervisor for this script. If calling is not in job description, please email the name of the business to your supervisor with "Scrub call needed" in the subject line. Leave the business as "unknown" in the CRM.

GOAL: Enter as much information into the CRM as possible about the researched company!

Cleaning and Qualifying a Cold List Over the Phone

Qualifying a business and finding out who we should be marketing to is an important, time and money saving task for both inside sales reps and new business development reps. If using internet search engines or websites cannot produce the accurate information needed to qualify a business, then a "scrub" phone call to the business should be made. Below is the script we use when we call and speak to the gatekeeper of the potential prospect.

Script

Hi _____, this is _____ with [Your Company Name], how are you today? Great. I hope you can help me…I have an invitation here that I need to mail out to your company's CEO, it's for an upcoming executive event. Could you help me verify the mailing address, I have <<company address>> is that right?

Great! And I <<CEO Name>> is the CEO I have in my notes, is that, still right?
If they give a new name: Ok thanks for your help with that. And is their title CEO?
And, just so you know, the event is geared towards businesses with 10 or more employees, does that describe you or no?
If YES: Perfect, I'll send him/her their invitation today. Is there an email address for him/her that I can send a follow-up invite via e-mail?

Thank you! I'd also like to include an invitation to the person who supports your computer network…may I get that person's name?
And are they at the same address or is there another address I should send their invitation to?
WHY the PC guy?? We're a technical company as well and would love to network with fellow techies.
If NO: Ok thanks for letting me know, I'll save his/her invite for our next event for smaller businesses.

You've been a great help, thanks so much.

Have a great day!

After the call, please follow these important next steps:

1. Add/update all info you obtain to CRM
2. Update lead status (qualified, unqualified, etc.)
3. If qualified, update contact groups

Performance Evaluations

Sales Team Accountability

"What differentiates sellers today is their ability to bring fresh ideas."

- Jill Konrath

CEO and Sales Manager 1:1 Meeting

Conduct this meeting weekly. Sales manager should come prepared with documentation to satisfy the below items:

1. Sales Results
    a. Sales Team goal
    b. Sales Team pipeline goal
2. Review recruiting bank
3. Review Sales Playbook progress – develop with your salespeople, includes training plan for new salespeople
4. Corrective action for missed KPIs and lost sales
5. Update on daily practice meetings – role playing, disc training, meeting scripts, closing
6. Number of ride-alongs
7. Development plan for each salesperson
8. Review active pursuit list
9. Review planned motivational sales team activities – incentives, contests, etc.
10. Plan for the week

Sales Professional and Sales Manager One-on-One

The One-on-One weekly meeting is the best way for Sales managers and Sales Professionals to connect on pressing issues, develop a strong relationship, and ensure that employees feel like they're working toward their goals – at work, and otherwise. Without a proper framework, agenda, and mindset, however, the 1-1 meeting can become just another meeting in your day. So, we have come up with a tactical game plan for making the 1-1 meetings the most important meeting for you to become successful and meet your goals.

A One-on-One is a dedicated space on the calendar and in your mental map for open ended and anticipated conversation between the Sales Manager and the Sales Professional. Unlike the weekly status report update during the Bacon Meeting, the 1-1 meeting is a place for coaching, mentorship, giving context, or even venting. The 1-1 goes beyond an open-door policy and dedicates time on a regular cadence for the Sales Manager and Sales Professional to connect and communicate.

To ensure the One-on-One meetings happen each week, set aside 30 minutes, the same day and time each week. Also, this meeting does not always have to be confined to an office or conference room. At times, it may be best to go for a walk or grabbing coffee.

In the One-on-One be prepared for open ended questions such as these:

- How are you feeling this week?
- What is on your mind?
- What are you most excited about?
- What are you most worried about?
- What's your pie chart of what you are working on?
- How do you view yourself in your role?
- If you were having the best workday ever in your ideal role, what would your schedule look like?

Also, be prepared to add agenda items to the calendar invite prior to the meeting with these suggestions in mind:

- Set aside time prior to your One-on-One meeting to organize which topics you'd like to discuss and add those to the meeting agenda.
- Feeling frustrated, overwhelmed, blocked, excited? Think about why you feel this way and outline any specific potential solutions you'd like to work through with your Sales Manager.
- Remain open to discussing what's really going well and where you need your manager's support.
- Ask for what you want in layperson's terms and discuss things in specifics.

The One-on-One meetings will serve as a place to share open and honest feedback with your Sales Manager to build your dream career. Along with the above topics, a review of your Sales Pipeline will also be discussed.

Sales Management Spreadsheet

As a sales manager, you need to make sure that you are doing the right things; that you are effectively communicating what is needed and what you want your people to do. Additionally, you want your salespeople to be able to measure themselves to your measurements. To ensure this, we measure the factors that contribute to successful sales rather than just tracking revenue.

Some measurements are subjective, and others are objective. You need to create a balance between the two. *Objective* measurements communicate in mutually agreed-upon terms what is expected and how you are going to measure the results. However, if objective measurements are all you need, how are you supposed to add value?

By adding *Subjective* measurements to the people-management equation. The creation of revenue has many variables: timing, competition, service quality, marketing, support, and product quality to name a few. What does the sales manager have control and purview of? What are the variables the sales manager can adjust to impact revenue? There are only two: Frequency and Competency.

You want your salespeople to do a lot of (frequency) of good things (competency). If they do a lot of good things, revenue is guaranteed. So, you need to measure your salespeople on doing a lot of good things. Measure them proactively. Measure them subjectively on objective metrics. Measure Frequency and Competency.

The success formula for sales management is simple: R – F X C. Revenue equals Frequency Times Competency. You want to have your salespeople doing a lot but a lot of what? You need to communicate what you specifically want them or need them to do. Below is a sample list of frequency metrics:

Sales Calls per Week
Weekly Canvasing
Prospect Office Visits
Sales Reports on Time
Sales Proposals per Week
Sales Funnel Quality
Cold Calling
Sales Discovery Meetings per Week
Creating New Prospect List from Research
Time Management

Make a list of the frequencies you need from your salespeople over the next 90 to 180 days. Whatever they are, establish them as objectives and measure them weekly.

You also want your people to have a high degree of quality in the tasks they do. You want them to be competent. Here is a sample list of sales competencies:

Presentation Skills
Objection Overcoming Skills
Professionalism
Sales Cycle Control
Negotiating Skills
Ability to Get Things Done
Prospect Qualifying Skills
Product Knowledge
Personal Confidence
Prospecting Skills

You should develop your own list of what skills, traits, work habits, etc., you want your salespeople to possess. If you effectively communicate to your people good things you want them to do, your chances of success will improve significantly.

With all of that being the case, the Sales Management Spreadsheet was developed to effectively communicate objective measurements in a subjective manner. This is a management overview divided into three segments (Revenue/Performance, Sales Competency, Frequency) for five sample salespeople. This spreadsheet should be done quarterly or monthly, depending

on your management needs. Under each segment, there is a list of the manager's assessment of the characteristics necessary for the revenue to come in. These items, if done well, are what the sales manager believes will lead to success.

The Rs, Fs, and Cs can change over time. In fact, it is a good idea to change one or two per quarter to make sure you are always evaluation what will be required for success in the coming three to six months. Each salesperson would be given a sheet showing only his or her own scores. The manager has done an evaluation of each salesperson on a scale ranging from 1-5 (5 means well above expectations, 4 means right at expectations, 3 means very close to expectations, 2 means we must talk, and 1 means we *really* must talk).

In the sample spreadsheet, Jim is not doing well, and it shows by the Revenue/Performance line. He is getting 2s and 3s out of a possible 5. Time to break out *"the speech"*, the Sales Frequency 101 speech you have ready for just an occasion. The speech about the "Sales is a numbers game.," or "You have to be with prospects to get clients." If you look at Jim's frequencies, you can see he is out in the field, getting 5s in Networking Events/Group Attendance and Calls Per Week. Look at his competencies. Product Knowledge and Efficient Resource Utilization are getting 2s. But then you remember he is a rookie salesperson. Armed with this information, you now know what to do: Instead of reciting the Frequency 101 speech, increase Jim's competencies. This spreadsheet will point exactly to the area where you need to focus you time, effort, and energy for Jim and the others.

Look at Leon's Competencies and Frequencies. This is a good salesperson who did not work a plan this quarter and did not learn about the new products, as shown by the low scores for Territory Plan and Product Knowledge. So, because Territory Plan and Product Knowledge are deficient, what do you New Sales will look like? Leon scored a 2 in New Sales. It's predictable. This spreadsheet can predict future and current revenue/performance based on Frequencies and Competencies.

Look at Maritza. Retention Sales and Sales Quarterly Review are down. This is obviously a good salesperson, but because revenues are down, isn't it time to go crank her up so she sells more? Isn't it time to taunt her with the old, "Well how com no one else is having the same problem?" or "You are finally starting to become a normal salesperson, eh?" That should make her more productive, right? Well, if you look at her Frequencies and Competencies, she is doing the right things and just had a bad month or quarter. Leave her alone. She knows she had a bad quarter. If anything, reassure her she is doing the right things from a frequency and competency standpoint. She will break through and bring in the results again. How do you know? The Fs and Cs are telling you so.

Here are some additional rules for the Sales Management Spreadsheet:

- Each area should be taken on its own merit. Treat R, F, and C separately since the summary score would be meaningless. You want the salesperson to concentrate on selected areas, not on an overall ranking.
- Do the R first. This way it sets an accurate picture of current performance in your mind. Then you can move on to the C and F metrics, which is your ranking of what behavior you want them to work on (future) rather than focusing on R (past).
- Between 10 and 15 variables is the right number of Rs, Fs and Cs. It seems when the spreadsheets are over 15 metrics, they tend to lose their focus. Ten to 15 variables will focus on the right number of issues.
- Do and S.O.S. to decide how you want to introduce this tool to your sales team. You may choose to give the salespeople a blank sheet and have them fill it out to compare to yours. You may want to work on it together.
- You will have a running score of performance issues over time. Consider this a consistent communication vehicle you are using to inform and gain agreement with your sales team on how they are doing. It is a useful, mutually agreed-upon measurable objective over time. Use the scores to track performance over time and compliment consistent good performance. We tend to focus on what's wrong and take for granted our good, consistent performers – at least in formal communication.
- You are measuring each salesperson to a metric for which all members of the sales team are being held accountable. It is a useful documentation for formal corrective action procedures.
- Be consistent and timely in your reviews. Try to make it a habit to discuss weekly performance during your one-on-ones.
- It should take you about 20-30 minutes to prepare and complete each evaluation. Go with your gut feeling and adjust when necessary.
- When you have your one-on-one, let the salesperson participate. If you think she deserves a 3 in a certain ranking, and she is adamant about deserving a 4 ranking, go ahead and give her a 4. "Winning" will likely give her a tendency to focus on the issue. And doesn't everyone win if the task ends up getting the right amount of attention?
- Customize it. If you give a 2 raking to a C performer, that does not necessarily mean you have to use the same measuring standard for everyone else. The 2 you give to a C is not necessarily the same against which you will be

measuring the A player. For example, you may want to give an A player a 2 in an area where you want him to focus his attention. Compared with the C Player, however, he is still a 5. Do you give him a 5 because he's better than a C? Rankings will carry more impact if you customize on an individual basis. You are measuring salespeople on their individual abilities and performance, not comparing them to one another. This spreadsheet is a true measure of salespeople's unique skills and the level to which you want each one of them to perform.

Managers need a way to measure the future. They need to be able to formally communicate to both their salespeople and upper management the sales team's competencies and frequencies. This Sales Management Spreadsheet is invaluable as a communication tool. It lets the salesperson know what behavior is expected of him in the future. It tells them how to succeed.

For the manager, it is a communications vehicle that enables the completion of specific tasks required to get the job done. To more senior managers, it describes the current state of the sales team, the deficiencies that exist, and the overall trends. It also pinpoints low-scoring areas that may need management attention or added resources. In all, it is highly effective for managers to proactively manage their sales team.

Example Sales Management Spreadsheet

1-5 Scale (1-Low; 5=Excellent)	Jim	Leon	Ute	Gretchen	Maritza
Revenue/Performance					
Sales Y-T-D	2	3	3	4	4
Sales Monthly Review	2	3	2	4	2
New Sales	3	2	1	3	5
Retention Sales	2	4	4	3	2
Margin Sales	2	5	2	3	4
Totals	**2.2**	**3.4**	**2.4**	**3.4**	**3.4**
Sales Competency					
Sales Cycle Control	3	4	2	2	5
Presentation Skills	3	4	2	4	5
Qualifying Skills/Knowledge	3	5	2	2	4
Product Knowledge	2	3	4	5	4
Efficient Resource Utilization	2	5	2	3	4
Prospect Knowledge/Research	4	4	1	5	5
Totals	**2.8**	**4.2**	**2.2**	**3.5**	**4.5**
Frequency					
Sales Proposals per Week	2	3	2	4	5
Territory Plan	4	2	1	2	4
Calls with DM	3	3	4	3	4
Weekly Prospecting	5	4	2	3	5
Networking Events/Group Attendance	5	4	2	2	5
Calls Per Week	5	4	2	3	5
Totals	4	3.3	2.2	2.8	4.7

Sales Management Spreadsheet

1-5 Scale (1-Low; 5=Excellent)					
Revenue/Performance					
Sales Y-T-D					
Sales Monthly Review					
New Sales					
Retention Sales					
Margin Sales					
Totals					
Sales Competency					
Sales Cycle Control					
Presentation Skills					
Qualifying Skills/Knowledge					
Product Knowledge					
Efficient Resource Utilization					
Prospect Knowledge/Research					
Totals					
Frequency					
Sales Proposals per Week					
Territory Plan					
Calls with DM					
Weekly Prospecting					
Networking Events/Group Attendance					
Calls Per Week					
Totals					

Expectations of a Sales Manager

- Sales Team Goal
- Sales Team Pipeline Goal
- Review Recruiting Bank
- Review Sales Playbook and Revise with Sales Professionals as needed (to include training plan revisions as necessary)
- Corrective Action for Missed KPI and Lost Sales
- 1-1 Weekly Meetings with Sales Professionals
- Monthly ride-along
- Development Plan for each Sales Professional
- Report Active Pursuit List
- Report, Review and Revise Planned Motivational Sales Team Activities (Incentives, Contests, etc.)

Expectations of a Sales Professional

Sales Revenue Goal Attainment

- Monthly Recurring Revenue (MRR) Average

Pipeline Management

- Continual update of Opportunity, estimated revenue, estimated close date, sales stages, and status

Account Ownership

- Engaging with Team members via established processes and workflows
- Processing/Completing assigned activities, the ticket is the token (Opportunities, Activities, Tickets)

Sales Call Jams

These are calls made as a sales team to review best practices and learn new techniques while setting appointments over the phone. Traditionally, all sales professionals and the sales manager converge in one room and take turns calling one at a time on prospects to set a 1st meeting.

Using specific follow-up scripts or the provided scripts (see telemarketing section), calls are made via speaker phone to reach the decision maker. After each call, a brief discussion on positives/constructive changes is had among the sales team. Call Jams tend to last one hour in time and apple towards the sales professional's KPIs for calls made in a week.

Appendices

Additional Resources

"Motivation will almost always beat mere talent."

- Norman Ralph Augustine

Appendix A: Terms to Know

CRM: Customer Relationship Management; software used for database management, customer tracking, etc.

Marketing Qualified Lead: A prospect that has qualified through marketing efforts well enough to be escalated to sales

Sales Qualified Lead: A prospect that has qualified through sales efforts and has and the next steps would be to create an opportunity

Scrubbing: a general term for list generation – adding or removing businesses or contacts to keep our database current. Also adding information about that business or contact to CW. Ex: employee count, revenue, address, emails, phone number

Prequalifying Research: using the online search engines and social medias, as well as surveyed documents such as the Book of Lists, Chamber member lists, to qualify or unqualify a business. This is also used for finding the right contact at the business to focus our marketing on.

Script Calling: using a specific script to call a business to obtain qualifying information: how many employees they have, who is the IT decision maker, if their IT support is in-house/outsourced, etc.

Unknown: a business we have not qualified but we think may be a potential prospect. Using a scrubbing script or google stalking the business helps us qualify or unqualify them.

Prospect: a business that is qualified that we will market to until they “buy or die”.

Engaged: a business that is qualified and may be a prospect in CW, but has now raised their hand to read our marketing material, clicked on our link via email, agreed to meet, etc.

Marketing Automation Platform (MAP): used to automate email campaigns, social media, and other marketing activities

Appendix B: Example Call Script / Handling Objections

Opening Script
Call 1 to Gatekeeper: Hello, my name is _____ I'm calling from [Your Company Name]. How are you today? <<REPLY>> …I'm calling because my CEO left me a note to reach out to [Prospect Name] to set an appointment for her to meet with him/her. Can you help me with the best way to go about arranging that for her? <<REPLY>> OK, if you could [send me to voicemail, give me email] that would be great. **Call 2** to Gatekeeper: Hi, this is _____ from [Your Company Name]. We talked last week. Is [Prospect First Name] available? "What is this about?" [Prospect First Name] wants to meet with him/her regarding your technology strategies. Is he/she available? Hi [Prospect **Name].** My name is _____ with [Your Company Name]. Are you familiar with our company? (We are / Then you know we are) a [Your Sales Story]. Our CEO [CEO Name] left a note on my desk to reach out to you to see if you'd like to sit down for a strategy session. Would you have time to meet with [CEO Name] next week?

NO - #1	**I am not Interested - happy now *(their reason)***	
Response	**Feel**	I totally understand.
	Felt	As a matter of fact, most of our current clients said exactly the same thing.
	Found	My CEO is interested in having more of a *strategic* discussion about how companies in your industry can maximize the return on their IT spending.
Pivot 1	**I'm just curious**, to keep on top of how new technology impacts (your industry) do you rely on your internal team or do you solicit views from IT industry leaders? **They Answer** **You know, that may be a good reason for you to meet with [CEO Name].**	
	She would like to share with you some of the ways we have helped our clients who have that same approach (repeat their answer) by providing a FRESH perspective on the value of new technology. **Would you have some time on Thursday that we could get together?**	

NO - #2	**I have a really great irreplaceable internal staff.**	
	Feel	I understand.

Response	**Felt**	As a matter of fact, many of my clients have an existing IT team that they are happy with.
	Found	They became our clients also because we offer tools and services that typical internal teams cannot afford, or do not use often enough to make it worth the investment.
Pivot 2	**I'm just curious**, during budget season, what tools do use to measure the performance of your network, for example down time or response time? **They Answer** **You know, that may be a good reason for the two of you to meet.**	
	[CEO Name] would like to share some of the tools used by other companies your size, plus you two can compare notes on where IT costs are heading. **Would you have 30 minutes on Wednesday that we could get together?**	

NO - #3	**I am not the right guy**	
Response	**Feel**	I appreciate why you might feel that way.
	Felt	Most executives prefer to let the tech guys handle the tech issues.
	Found	That said, I don't want to have a tech discussion, I am not a technical guy. I am a business guy who likes to compare notes with other business guys about how technology investments are impacting business models.
Pivot 3	**I'm just curious**, what is the **title** of the person you think I should meet with? **They Answer** **You know, I think that's exactly why you are the right guy.**	
	Internal: Our experience is that (use the title) either 1) see us as a threat to their job, or 2) are too operationally focused. In either case, their ability to actually apply some of our more strategic ideas is limited. You, on the other hand, have a broader and long-term view of the return you really need from your IT investments. **Outsourced**: Our experience is that we often provide executives like you with some fresh ideas on how to get more out of their outsourcing service, since you will come away from our meeting with a couple of questions you can pose that should improve their services to you. **Would you have some time Tuesday at 3 that we could get together?**	
If they insist on our seeing the IT guy -	OK, I understand your point. But, may I make a suggestion? **YES** We will meet with your IT manager and you can ask him after the meeting what value he sees us bringing to the equation. WE will also take notes on what we think we bring to the equation. If those match, we can move forward. If they don't, will you give [CEO Name] 30 minutes to stop by and speak to you? **Would you be agreeable to a plan like that?**	

NO - #4		**I am too busy/going on vacation**
		I understand perfectly.
	A	Could I give you the Readers Digest version of why I am calling? **Get a YES**. **We meet with, and compare notes with executives who have an interest in making sure EVERY DOLLAR spent on IT generates the desired value for their business model. And, the value to the executives we meet with is - they typically hear one or two ideas that could IMPROVE the value of their current IT investment.** So, would you have 30 minutes compare notes with [CEO Name]? **>> >> >> >>**
When to use:	**B**	I was actually only wanting a minute of your time to set an appointment. Would you have time on Tuesday, say 3 that I could stop by?

A when first thing you hear. **B or C when into the conversation.** **D (disengage) when the conversation is not going any further.**	**C** **D**	**>> >> >> >>** When is a better time to call? **They Answer** Great, I have on my calendar to call (Date) - shall we schedule for this same time? **>> >> >> >>>** Well, (first name), it doesn't sound like: • this is a good time for us to get together. • we have anything of interest for you today. But, things change. When would be a better time for me to call you again? **Wait for a response (will almost always be affirmative. If they seem not to have a time in mind, say '**How about in 90 days.'**)** Great! Thanks for taking the time to chat with me today. I'll speak with you then. But just in case you might need to speak to me prior to that, I'd be happy to send you my contact information if you'd like. May I get your email address? Thanks, I'll speak with you in a few months.

NO - #5	**Send me some literature?**	
Response	**Answer**	I would be happy to provide you with some information.
	Augment	We offer a lot of different IT solutions. To make sure I get you the right information, I'd like to ask a question.
Pivot 4	**I'm just curious**, what do you see as the biggest IT challenge you'll face in the next 12 months? **They Answer** **You know, that may be a good reason for you and [CEO Name] to get together.**	
	Would you have some time next Tuesday when she can stop by?	
If they really insist.	Ok, I'm going to send you some blog posts that [CEO Name] has written. Since I expect you are busy as most of us are nowadays, let me suggest a plan of action. How about I give you a call this same time next week to see what you thought about the information I am sending? Would (state time) next (day of week) be good for us to chat again? What email can I send them to?	

NO - #6	**Direct Question about *Product?***	
Response	**Answer**	Good question.
	Complete Answer	***Product*** is a big topic.
	You know, that may be a good reason for the two of you to get together. We can share the latest (trends/solutions/challenges) that our customers have faced and what they have done about them. **Would you have some time Tuesday at 3 that we could get together?**	

NO - #7	**Direct Question. *Eg. How are you guys different?***	
	Answer	Primarily, we are considered different because of [Key Differentiator].

Response	**Complete Answer**	[Sales Story]
Pivot 5	**I'm just curious**, is technology at [Prospect Company Name] viewed as a strategic advantage or as an operational issue? **They Answer** **You know, that may be a good reason for you two to get together.**	
	Strategy - He would like to share with you how some of our local clients stay on top of the latest ways to use technology strategically. ***Operational*** – She would like to share with you what we have seen our local customers do to improve the control they have over their IT effectiveness while also lowering costs. ***Little of Both*** - That can be a challenging balancing act and [CEO Name] would like to share some of the experiences our customers have had in defining that 'just right' balance. **Would you have some time Tuesday at 3 that we could get together?**	

NO - #8	**Direct Question.** ***Eg. What is the meeting about?***	
Response	**Answer**	Short answer is 'How IT investments impact business models.'
	Complete Answer	We meet with local businesses, to compare notes on where technology is going, how it impacts the budgets of companies in various industries - Like yours for instance - and share how our customers are getting the most from their IT spend.
Pivot 6	**I'm just curious**, on a scale of 1 to 10, how comfortable are you that your infrastructure is bulletproof? **They Answer** **You know, that may be a good reason for us to get together.**	
	If 10. You guys are obviously doing things right and we would like to compare notes with you on the definition of bulletproof to see if either of you could improve our current approaches. ***If less than 10***. Our CEO would like to share some of the things our clients are doing to continually march towards 10. Sometimes small changes can have big impacts. **Would you have some time Tuesday at 3 that we could get together?**	

NO - #9	**I have a great outsourcer relationship.**	
Response	**Feel**	I totally understand.
	Felt	As a matter of fact, many of [CEO Name]'s meetings are with companies who have an outsourcer they are happy with.
	Found	They find that we offer value by providing a fresh set of eyes on their situation and often glean a couple of good questions to ask of their provider.
Pivot 7	**I'm just curious**, what would you say is the best idea your current company has given you over the last 12 months? **They Answer** **You know, that may be a good reason for us to get together.**	
	We would like to share some of the latest ideas in the marketplace that our customers are evaluating. You may find some of them of value to your company. **Would you have 30 minutes on Wednesday that we could get together?**	

NO - #10	Direct Question. *Eg. How are you guys different from my current outsourced provider?*	
Response	**Answer**	Primarily, we are considered different because of our [Key Differentiator]
	Complete Answer	[Sales Story]
	And that is the value to you in our getting together. Our experience is that we often provide executives like you with some fresh ideas on how to get more out of their outsourcing service. You will come away from your meeting with a little different perspective on what to expect from outsourcing and have a couple of questions you can pose to your current provider that should improve their services to you. **Would you have some time Tuesday at 3 that we could get together?**	

Gatekeepers

If a Gatekeeper answers, ask for the Decision Maker. Ask with conviction and a gatekeeper might do it. In any case, your chat with them has just started.

Gatekeepers can be friend or foe but are always a quick way to gather important information. In cases where you have a direct number, it is a smart tactic to 'zero out' to find a gatekeeper. Ask a few questions to qualify the account.

A good opening script is your variation of 'I am not sure if I even need to speak with <<DM>>, could you help me figure that out?

1. "Can you confirm my records? I show you have more than 10 computers. Is that still correct?"
2. "When you have problems with your PCs, printing or email, who do you call to get that fixed?"

If they ask, 'what is this about?' 'Well, maybe you can help me. My company meets with several companies each week about financial strategies for technology investments. These sessions are most valuable to companies of a certain configuration; can you confirm that your company still has 10+ employees that regularly use technology to do their job?' **ANSWER**. Great, can you help me with the best way to schedule a short meeting with the boss?

Short list of tactics when working with Gatekeepers

1. Mini-Me
   - They will often act like a DM in their comments and questions; so, use the techniques that you use with their Boss.
2. Enlist
   - Ask for help - 'My boss is expecting me…' Appeal to them on a personal level.
3. Avoid
   - Get Direct number of DM
   - Before 8, Noon, After 5
   - Call another department

Appointment Setting Concepts to Keep in Mind

The **First Step Qualify** strategy -

When on the Action Page for the first time, use this technique to find out if company warrants a Second Step in your Best Practice:

1. Go to gatekeeper. Can you confirm my records?
2. Go to another department (Sales, Accounting …) Confirm records or marketing event.

3. Go to IT. Marketing event.

Qualifying questions - **Do you still have 10+ desktops?** Who do you call when they break? Who approves IT budget?

The **Highest Skill** level is the ability to interpret indicators for the direction to take the conversation.

Telephone prospecting is the skill to start a relationship with a phone call.

The **Goals of the Prospecting**

Goal of the **Call** if no Conversation
- Qualify the account
- Confirm important account information

Goal of the **Conversation**
- Set an appointment
- Get permission to call again

Rule #1 when asking for an Appointment

- Prospects must hear value to them before being asked for an Appointment

  What's in it for them?