

**eBook**

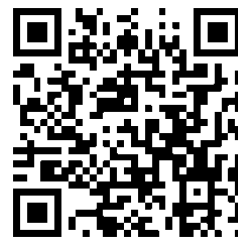
**Sales team  
management**

# **Sales team management**

## How to create a high-performance team

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## Introduction

We recently started teaching a "Sales Team Management" Workshop, where we talked about how managers should prepare, manage and lead a high-performing team.

The workshop is taught by my partner and I followed, as a listener, the first two classes. In one of them I was impressed with the amount of notes that the participant made. I believed he would reproduce the workshop within his company, given the detail of the notes.

At the end of the workshop he came to me, exhausted from so much writing, and asked if he could participate again in an upcoming workshop. He told me that he had already managed the sales team for 2 years, but with unsatisfactory results. He said the workshop had not only shown him several "cake recipes" he had never thought of, but that over the course of the day, the workshop had sparked a huge host of new ideas. Hence the intense "paper" record.

I then decided to transform the content of the workshop into a series of eight articles that now constitute this ebook that will also be distributed to the workshop participants.

I hope the content is useful to you and your company and as fruitful as it has been for the participants of the "Sales Team Management" workshop.

Dagoberto Hajjar - CEO  
ADVANCE Consulting

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## What should a salesperson's goal be?

### *Mathematics applied to the sales funnel*

This is one of the questions I hear the most from sales team managers: "**What should a salesperson's goal be?**". Well, the answer is more mathematical than it seems and can be calculated in 3 steps.

In the first step we will **establish the number of business days to sell**. The year has 365 days, 52 weeks, being 104 weekend days and 261 weekdays. We're going to take 30 days between vacations, holidays and bridges, and we're going to subtract 10 days for illnesses and training. Now we will decrease another 1 day a week for the seller to do planning, meetings and internal activities, emails, processes and bureaucracy. Thus, at the end we took from the year 196 days called "not selling" and there were 169 days left to sell. Note that there is well under half the days of the year left!

Just as a reference, let's say John, a salesman, has a sales **goal of USD 2 million annually**. If we divide this goal by 169, which are the days to "sell", and divide by 8 hours a day, then, rounding up, the seller should generate \$ 1,500.00 per hour. If he attends an unproductive meeting it will have cost \$1,500/hour. If he does powerpoint beautification it will cost \$ 1,500 / hour ... It's a fortune! the seller's focus should be solely **on SELLING**.

Let's go to the second step, and **divide the seller's goal by the average ticket**. In my example I will put goal of USD 2 million and **average ticket** of USD 100 thousand. Following this line the seller will have to close 20 opportunities to reach the goal. Now let's look at conversion rates in the sales funnel. I will use averages of the Brazilian IT market which are: for every 10 opportunities prospected, it is generated: 5 qualified, 3 proposals and 1 closed negotiation. So we have a total conversion rate of 10%. In my example the seller has to close 20 opportunities and to reach these numbers he will have to prospect 200, qualify 100 and send 60 proposals.

And the third and final step is **to estimate the number of hours the salesperson spends in each of the phases of the sales funnel**. Still in my example I will put 2 hours to prospect, 2 hours to qualify, 8 hours to develop the scope of the proposal, 4 hours to generate the proposal and 8 hours from the moment you deliver the proposal to the closing. If, in my example, the salesperson spends 2 hours to prospect and if they will have to prospect 200 opportunities, then here it was 400 hours or 50 days. I keep doing this calculation for the other phases of the sales funnel and I will conclude that to reach the goal of \$ 2 million with the conversion rates and estimated times, then the seller will need 1,640 hours or 205 days. Whoops... we have a problem here... The year has 169 days to "sell", mathematically the seller will not be able to reach the sales goal.

We still have to think about whether we could gain efficiency in the sales funnel. There are **3 variables**: increase the average ticket by adding more products or services, improve conversion rates using sales and marketing methodologies as support, and reduce the time spent at each step using processes and templates. If we can't have efficiency, then we would have to lower the target.

I had a boss who loved to talk about the **4 magic quadrants** and asked us to categorize the work we did in:

- 1) what I do today and have to keep doing
- 2) what I do today and could pass it on to someone else
- 3) what I do today that I wouldn't have to do but don't have to do
- 4) what I do today and if I don't do it won't make the slightest difference

It is impressive the number of activities that fall in quadrant (4) - they are activities that we like to do, even trying to convince others that they are "important" activities, but in the end, they do not generate any results for the company or for the goal.

**The mission of the manager, nowadays, is to analyze all the data of the sales funnel and ensure that the seller has the instruments and the necessary FOCUS on selling. Just sell!**

## Do you have a healthy sales funnel?

### *Quantity, balancing and speed*

The sales team manager's job is increasingly analytical and he has to ensure that every salesperson has a healthy sales funnel. For this we have to analyze 3 **variables**: 1) the total **amount** of opportunities in the funnel; 2) the **balance** of the funnel with the conversion rates and number of opportunities in each of the phases of the sales funnel; 3) the **speed** with which the transaction happens in each phase of the funnel.

When the manager compares the **funnel of each salesperson**, he can see if the planning and execution of the salespeople needs adjustments. There are salespeople with the **fat funnel** and full of opportunities, where the big challenge is to prioritize the customers who are most likely to buy. There is a salesperson with the lean funnel and who will not want to "filter" or "throw away" any customer, even if he knows that the customer will not buy, for the simple fact of being with the thin funnel and no options.

By analyzing the sales funnel, the manager can recommend **actions to increase the speed** with which transactions pass through the funnel. In the prospecting stage, the manager may recommend the use of internal or outsourced SDR (Sales Development Representative), or use marketing actions such as events or content dissemination, fattening the funnel. In the qualification stage the manager can be more rigorous in filtering, ensuring that the seller has a focus on the customers who can really buy. In the demonstration stage of the solution, the manager can involve the directors of the company to support the seller. At the closing stage, the manager must ensure that the seller knows the most modern negotiation techniques. In the post-sales stage, the manager must ensure that the seller (customer success) has instruments to analyze the customer in depth, that he knows the techniques of cross-sell and up-sell, and that he has a fantastic service, preventing the customer from leaving (churn).

I had a boss who said that **the success of the sales area depended only on two things: planning and execution**. In Brazil, salespeople are excellent at execution, but they need a lot of help from the manager to do the planning.

The manager starts by doing sales **planning (territory plan) where he** establishes the strategies to achieve the sales goals in the base and in new customers, analyzes the sales funnel to ensure that the goals are feasible, makes the allocation of resources, determines the sales speech and competitive speech, and proposes innovations to increase the competitive differential. Then the manager divides the portfolios or establishes market segments for each seller, and works on the elaboration of strategies and approach campaigns for each established segment, and defines the priorities of attack on the segment.

Most businesses have much of their revenue coming from selling to "grassroots" customers, that is, customers who buy or have recently bought, or who the company wants to sell. In these cases the sales team manager must use the "account **plan**" tool so that together with the seller they can analyze, in depth, the account and establish strategies and actions to maximize sales. For each of the "important" accounts should be established: goals and objectives for the account, map of market and customer knowledge, decision and influence map, map of the client's pains and needs, map of the competition's performance, map of possible opportunities, strategies and resources to achieve the goals and objectives, and action plan that should be controlled and monitored periodically.

To finalize the manager and the sellers, they must do "**analysis of losses and gains**", identifying the reasons why the negotiation was lost and the learnings not to repeat the same failure again and lose trades, and identifying **WHY** the negotiation was really won so that it can replicate this success.

**The manager has to ensure that the planning is very good, that the funnel of each salesperson is healthy and that he has all the necessary tools to execute the planning. That's it!**

## **Management is beating the drum...**

*Correct cadence to create resonance*

The job of the sales team manager is **to do good planning and ensure excellent execution**, or popularly called drumming. This will ensure the **correct cadence** and synergy between the marketing, sales and operations areas.

The manager has a **4-steps** to beat the bass drum and generate excellent sales results.

The first step is to **choose the best sales methodologie or methodologies** to meet your needs. There are many sales methodologies, each with its particularities and strengths. Most IT companies today use a combination of Solution and SPIN Selling, Value-based and DRIP selling.

The second step is to **implement tools and processes**, to give elements of information to the team and reusability of best practices. Many managers define check-lists to evaluate salespeople at each of the stages of the sales process, ensuring objectivity in the evaluation and professional growth.

The third step is to **integrate the tools and processes** so that salespeople have an information intelligence system that supports them to make the best decisions. You have to make a good choice of CRM integrated with pre-sales (SDR) and post sales (CS) and define, very well, the reports to make analysis of the sales funnel, control the pipeline and increase the predictability of the forecast (sales forecast). The processes should include planning, follow-up meetings and sales mentoring, analysis of learnings and continuous improvement.

The fourth step is **mentoring**. The manager must be constantly observing and offering feedback for the improvement of the seller, motivating him to study, practice, make mistakes and learn from failures, and share what is generating good results. The manager must have been the "teacher" transferring knowledge (study) and experience (practice) to his "tutors". One of the techniques is the "role play" through which the seller can practice, acting as if he were on the customer, and receiving feedback from the manager and other salespeople - based on the evaluation check-lists. This allows you to adjust the speech and practice the techniques before going to the client.

The **pandemic** has created a very different work environment, with constant market changes, **requiring constant changes in the way sellers are sold and managed**. The manager should evaluate and reassess the nature and direction of the changes and constantly review priorities, encourage and support new ideas and trial-and-error initiatives, constantly observe the team to measure their understanding and attitudes towards the changes, update salespeople regularly and evaluate their understanding of the latest developments.

The book "Successful manager's hanbook" helped me a lot in improving managerial skills and competencies. It establishes **32 competencies** for managers and gives valuable tips for the manager to achieve their employee management goals, business objectives and objectives for personal improvement. Among the competencies are Leadership, Motivation and Encouragement, Evaluation and Analysis, Planning and Execution, Strategy, Business Knowledge, Self-Management, Communication and Interpersonal Relationship.

ADVANCE offers, on its website, the "**Sales Team Manager's Guide**" with 40 forms for the manager to apply in the day-to-day of his team, including sales plan form, chart of accounts and opportunities, discovery and qualification forms, and seller evaluation forms in each of the stages of the sales funnel.

**With this arsenal of tools, the manager will be prepared to beat butt and bring great results to the company.**

## How to win hearts and minds

### *Leading the team to success*

When we talk about leadership I always think of Gandhi or Martin Luther King who had millions of followers, but I also remember two spectacular leaders who were sources of inspiration and wisdom for me and a select group of people. I'm going to talk about my bosses because I lived with them a lot and unfortunately I didn't have the privilege of being with Gandhi or King.

These two bosses had very similar characteristics, which today I understand to be essential attributes and that are part of the leadership kit.

The first characteristic, and one that is most present in my memory, is **PATIENCE**. Even in the midst of the great fires of everyday life they stopped to teach me whenever it was necessary. I would arrive "breathless" with a problem, and they would take the time to make me reflect, look for the best alternatives and turn the problem into a delicious challenge. Many years later I met one of them and we commented on a certain situation. I told him "you had the patience to help me more than 1 hour" and he replied "it was no more than 5 minutes". They were both right, my leader's 5 minutes was 1 hour of learning for me.

The second characteristic is **MOTIVATION**. I remember one moment, late at night, I exhausted and unable to see a light at the end of the tunnel the problem seemed huge, to the point of swallowing me. The leader put his hand on my shoulder and said "get on the stool! If you are on the same level as the problem you will see no solution, go up a step and look over, let the creativity flow. He pointed me at a piece of paper that was in the corner of the table. The puzzle gave me energy for another 4 hours of work, and suddenly, the paper in the corner of the table was the key to my puzzle.

The third feature is the "**FLAG**". We all knew the leader's professional ambitions and worked with a large bloc to support him. Every 6 months came the alignment speech "the war is formed of several battles" he said "for the next 6 months our battle will be "this" and there came the flag, and what we should follow. Hearts and minds aligned with the flag, and each area and each person knew exactly how to contribute to winning the battle of the time.

The fourth feature is the **TEAM CONSTRUCTION**. My two bosses knew very well how to "read people," identify skills, competencies, potential, motivators, and fears. They knew how to put the right person in the right place, prepare them and motivate them for the right time. They knew how to integrate the team, and make the team work with respect and help between the parties, creating a cohesive and synchronous block. I once watched the movie "Moneyball" where the character played by Brad Pitt created a team without multimillionaire stars, but with such synergy that he ended up winning all the championships. Kind of like the "wizard of Oz" where each character had important skills and competencies for a given battle and ensure success in the end. Bringing to the corporate environment read: **DIVERSITY** and **ENGAGEMENT**.

### **Managing or managing a sales team is very different from leading the team.**

The manager can be excellent, analyze all sales funnel data, ensure a healthy funnel, control opportunities, make sales meetings ensuring high predictability (forecast), setting up the right structure and processes, and training the team.

The leader does all this, but goes further. He uses his knowledge of people's strengths and weaknesses to build a high-performing team. He **LISTENS** to and respects everyone in the group and thereby earns everyone's respect. It wins the hearts and minds of its employees, and with it, the team works with another level of energy and engagement.

### **Not every leader is born a leader. Leadership is a behavior that can be exercised and perfected.**

## Management and fires

### *Turning reactive selling into proactive selling*

Once I went to visit the president of a company that wanted my consultancy to increase sales in a certain region of Brazil. He told me, "We have two managers, each with a different team and serving different regions of Brazil. There's something wrong with Region2, they don't like it and they don't buy from us."

I started the consultancy going to interview the managers and salespeople of each team. They looked like two totally different companies.

The vendors in **Region2** were agitated, noisy, paced back and forth, told about the email they had just received from the customer, everyone joked. They all arrived too early to work and left too late. I sat next to a salesman to follow his work and even I was exhausted. He did a lot of activities at the same time. **It was one fire after another.** There were dozens of emails, whatsapps and phone calls from customers with questions, all at the same time. The work was 95% reactive, that is, they reacted to customer requests and internal orders. I went to interview the manager of Region2 and understood that he was the model that the sellers followed. "**Tutti uguali**" (all the same, in Italian).

**Region1** looked like paradise... All calm, quiet. I attended a **planning meeting** where the manager and the salespeople defined the strategies and actions of the week. They thought of a topic to address customers during the week, and they thought of "who" and "when" to address. They left with a plan of action. I followed their work for a few days, and 80% of the activities were proactive, that is, they called customers. The manager did the "check of the beginning of the day" and "check of the end of the day" making the team share challenges and best practices, and ending with "how can I help you?". The check lasted 3 minutes and ensured a tranquility and great synchronism of work.

I was "in the tight skirt." It was definitely not Region2 that bought less, but rather the Region2 team that was working reactively rather than proactively. **Working hard doesn't mean working right!!!**

**The manager is the mirror of the team.** There's a huge tendency to hire someone who's similar to you, and there's a huge tendency to demand that the team be like you, and there's a huge tendency for the team to want to be like the boss. "**Tutti uguali**" (all the same).

In English there is a phrase that marked me "**lead by example**". So, is your team of salespeople or firefighters who put out fires all day?

I invite the sales team manager to do an exercise: How do you prioritize the work that must be done? Are you **reactive** or **active**? Do you have a short list of what to do in alphabetical order or in order of priority for you and your company?

Let's do one more exercise for the sales team manager and invite him to think about the percentage of time allocated to: a) strategic sales planning; b) pipeline management; c) sales forecast (forecast); d) internal and operational meetings; e) development and advice of the sales team; e) active contact with customers; f) contact with customers in a reactive way.

Finally, I invite the sales team manager to think: **is your job to do or teach and help the team do?**



## **The 4 caps of the sales team manager**

### *Preparing the team to have high performance*

Once I finished a sales team management training and the class gave me 4 caps. I burst out laughing. It was clear to me that they had registered the importance of the 4 roles to be successful in sales team management.

**Cap #1 - Strategic sales planning.** Here the manager will have to provide guidance and authoritative opinions in the development of the company's business strategy, establish the goals of the sales team, target market segments, territories and portfolios, establish the strategy of action, structure and compensation of the team, instruments and controls of the funnel and sales processes, develop charts of accounts for important or strategic customers, and develop a joint plan with marketing to ensure that marketing strategy and actions are tied to the efficiency of the sales funnel, and use your relationship with business partner executives.

The 3 mistakes we see most in those who wear the Cap #1: let sellers choose customers and assemble their wallets; lack of integration with marketing, causing the cost of selling to be higher and efficiency lower; The manager does not use his network of relationships to seek new customers and to establish business and sales partnerships.

**Cap #2 - Execution of the sales process.** Here the manager will have to be personally involved in the strategy, preparation and execution of the company's main businesses; analyze the sales funnel, seeking efficiency in each step of the process; make salespeople feel responsible and take effective leadership in the development of the business that is theirs; ensure that salespeople are fluent and effective in positioning the company and solutions to customers; ensure that sellers have a sales plan for the year and for each customer in their portfolio and provide guidance and support in the preparation and execution of those plans; have at least one customer of their own; give mentoring and support for visits to customers.

The 3 mistakes we see most in those who wear Cap #2: delegating tasks and not responsibilities; having too many clients and not being able to devote time to "team management"; not providing formal training and using the "see how I do it and DO it the same" technique.

**Cap #3 - Sales control.** Here the manager will have to maintain and publish a pipeline of all the company's businesses with their REAL closing probabilities; offer forecasts adhering to the standard of accuracy and predictability required by the company and ensure compliance with the numbers; keep sales expenses within budget and oversee sellers' reimbursement of expenses.

The 3 mistakes we see the most in those who wear the Cap #3: Old and unreal pipeline; low predictability in the forecast (sales forecast); lack of attention to expenses.

**Cap #4 - Development of the sales team.** Here the manager will have to recruit, hire and retain qualified professionals; personally responsible for the results of the Sales Team; guide and collaborate in the definition of the sales training curriculum; actively and selectively participate in the field work of the sellers with the aim of developing them; motivate and respect the team, develop mutual respect between them, arbitrate disputes fairly.

The 3 mistakes we see most in those who wear the Cap #4: Not having the courage to fire an underperforming professional and "push" him to another area; Do not use the joint visit to the customer as an instrument of training and mentoring, and "take the reins" of the meeting, taking the power away from the seller; To think that every salesperson is motivated by money, to have a favorite on the team, and to say one thing and act differently.

**Management is a science, but let's face it, with many activities to do! After all these years, I still look at the to-do list of each cap every week to make sure I'm not letting something go...**

## **We don't want micromanagement**

*We want to delegate responsibilities and demand results*

A few years ago the word "micro management" became very popular as a practice that the manager should NOT do. Micromanagement occurs when leadership, wanting to control all the actions of its employees, follows and controls their work closely, giving excessive attention to details.

I met a management guru who said "the sales team manager has such a lot of important things to do that it's impossible to micromanage unless he stops doing what's important, which is doubly wrong."

The sales team manager has **4 caps**: strategic sales planning, sales process execution, sales control, and sales team development. It's work that never ends.

Here we will focus on **Cap #3 - Sales Control** and the 5 levels of sales management:

**Level 1 - Management of the sales team** - let's see the goals and performance indicators of the salespeople, the execution of the sales plan, portfolio or segment, the training and mentoring necessary for the team, the performance evaluation of each salesperson and the variable remuneration linked to the performance.

**Level 2 - Management of accounts or customers** - we will analyze the search for new customers by sellers, the execution of charts of accounts, and discuss about sales intelligence, that is, information that sellers have about the market and customers, and that can impact what is sold and how it is sold. At this level we also do the management of opportunities, where we will analyze the identification and qualification of potential opportunities, the execution of opportunity plans and the analysis of losses and gains of opportunities, that is, the learning we had throughout the process.

**Level 3 - Pipeline and forecast management** - we will analyze the pipeline and seek the improvement of sales forecasts. The manager should analyze average ticket, average sales cycle and conversion rates in the sales funnel. The manager should also analyze the deviations and establish recovery plans.

**Level 4 - Management of results** - the manager should make biweekly or monthly follow-up meetings of the company's sales performance, analyze what is giving good results and what needs to be improved (learnings), analyze why the company is losing and why it is winning the negotiations, and use these learnings to gain efficiency in selling.

**Level 5 - Sales funnel stages** - here we look at the average time that transactions stay in each of the stages of the sales funnel. We also look at whether salespeople are following all stages of the sales funnel or whether they are taking "shortcuts" that will ultimately hurt the performance of negotiations. We compare the funnel indicators of each of the sellers, and we also compare them with the market averages, so we have elements to think about and decide on actions that can increase sales performance.

The role of the sales team manager is increasingly ANALYTICAL. He has more and more data to analyze and make decisions to improve sales performance.

**The manager will have to delegate RESPONSIBILITIES and charge the results, making clear the roles and risks of each one. If, instead of responsibilities, he delegates TASKS, then he will be controlling and will fatally fall into the error of micro management as a way to reduce risk.**

## **No one likes sales meetings**

### *The 5 Types of Successful Meetings*

Weekly sales meeting! Have you seen this storyline? The manager opens the pipeline and forecast spreadsheet and starts the same litany as always. There is the salesman who always says the same thing. There's the salesman who just came to have coffee and eat doughnuts. There are salespeople who only joke. And the rest sleeps the entire meeting... Is there anything more unproductive and boring?

I jumped for joy when they released a book with the efficient techniques for holding weekly sales meetings. The methodology recommends 5 types of weekly sales meeting. Each with a different theme, in such a way that they repeat themselves each new month.

**Week 1 Meeting** - Results analysis and planning meeting, in which the sales plans, account and war plan will be addressed, and where we will analyze any deviations from the forecast and pipeline.

**Week 2 Meeting** - Individual results analysis meeting, where the manager will mentor to improve the execution of sales activities, understand the latest moves of the seller and review the strategies and action plans for the top 5 opportunities and the top 5 customers.

**Week 3 Meeting** - Monthly closing forecast meeting, in which the manager will analyze the results and performance indicators, to ensure that the goals of the month will be achieved. Forecast, pipeline, conversion rates in the funnel, average ticket, average sales cycle, and how to accelerate sales will be discussed.

**Week 4 Meeting** - In-depth mentoring meeting, in which the manager will do individual mentoring for a select group of employees. I recommend that the manager, monthly, select a different group of employees, for example: salespeople who are underperforming and need guidance for recovery, salespeople who are fundamental to the closing of the forecast of the month, salespeople who are in the process of training to assume leadership, and salespeople who are with strategic roles, functions or customers.

**Meeting of week 5 - Integration meeting with other areas, where the manager will discuss the quality of services provided to other areas and improvement actions, quality of services received from other areas and improvement actions, and SLAs that he has with other areas, status and improvement actions.** This meeting takes place only in the months that have 5 weeks.

For all meetings, participants should prepare their plans, reports and analysis in advance, and send them to the other participants to read before the meeting. Then, the meeting will be brief and will focus only on discussing divergent points, and making the decisions for improvement.

The organizer makes the opening, establishing the purpose of the meeting, questions to be answered, decisions to be made, and proposing the agenda and dynamics of the interaction. The organizer shares meeting notes so that everyone can write their comments and decisions in the same document. Participants' interactions are SHORT. At the end of the meeting, the organizer checks the understanding and the emotional check with each of the participants. The next steps are defined and the final reading of the meeting notes with next steps is made.

**With the new methodology, salespeople can understand the value of using CRM and data analysis to improve sales and, consequently, improve sellers' earnings in variable and bonuses. Exciting, isn't it?! So, bora there sell...**