

# TOP TEN SECRETS FOR INSTANTLY TURNING YOUR SALES FORCE AROUND

## A Special Report

By Troy Harrison

Are you getting the results you want from your sales force? If not, maybe it's time to give yourself a checkup. You do that for your own health – why not do it for your sales health, too? Of course, the biggest obstacle to the checkup is knowing what to check. That's what we're going to talk about today. These are my Top Ten Secrets for Instantly Turning Your Sales Force Around. I've even included a **special bonus offer** at the end, so read all the way through!

### Secret One: Understand the Formula For Success.

Being a sales manager (or VP-Sales, or a CEO) can be a challenge. There are potentially a lot of moving parts to your job. The good news is that, when we're talking about positioning ourselves for growth, there really aren't that many things to consider. As a manager, you only have two variables to work with in order to generate results, and only two methods by which to maximize those variables.

The two variables are *quantity of sales activity* and *quality of sales activity*. The basic equation looks like this: ***(Quantity of sales activity) x (Quality of sales activity) = Results***. In other words, the more you do of something, and the better you do it, the better your results will be. Your job, as sales manager, is to maximize the number of activities performed in your sales funnel, as well as the quality of those activities.

To maximize your results, you have two things to work with – your *people* and your *processes*. Your people should be working at the maximum reasonable effort, thus generating a high quantity of calls, appointments, proposals, and sales. They should also be skilled enough so that those calls are well done sales calls, thus maximizing your opportunities for prospects to proceed through the sales funnel and become customers.

### Secret Two: Build Your Sales Plan.

“If you fail to plan, you plan to fail.” Most of us have heard that many times in our business careers, but it's amazing how seldom it's followed. We start out with the right intentions, but things get in the way. To be successful, nothing should get in the way of having and implementing an effective plan for selling our products and services. A good plan should include:

**Our target market.** What market (geographic/vertical/etc.) do we serve? Are we focused on one metropolitan area or internationally? As you move forward in implementing a sales plan, it's important to know the scope of your sales efforts.

**Our target customers.** Few things are as basic to sales success as understanding our target customers – what types of businesses or individuals will use our services, their annual revenues or incomes, and how they will use our products and services. A good plan will also estimate the numbers of target customers that exist within the market that we serve.

Just as importantly, a good sales plan will define what is NOT a target customer. For most businesses, there are customers that are too small (and, believe it or not, too large) to serve profitably. Some of us will define our target markets by their values and the way that they do business, and eliminate those potential customers that are a bad fit. Remember – it’s okay to turn away bad business. In fact, it’s best to refer bad business to your competition.

**Our ideal salespeople.** What attributes do we want in a salesperson? Should they be high activity (lots of cold calling, prospecting, and presenting), or high relationship (less cold calling, more work with current accounts)? Is there a specific technical expertise that they need? Do we want them to travel? All of these things should be thought out and put on paper before any people are hired. Compensation plans should be included.

The key thing to remember here is that “selling isn’t selling.” A salesperson that might succeed in one sales environment may fail miserably in another. I firmly believe that the vast majority of salespeople truly WANT to succeed, and are able to succeed if they are correctly matched with their ideal selling environment.

Finally, be aware of what you can afford, and stick to it. If you have enough working capital to hire a 15-year salesperson with an impeccable track record, where the environment is a match, great. Do it. Just remember that you’ll pay for the privilege. Most small businesses have to give up something – prior training, experience, or track record – in order to find someone they can afford. That’s okay, too, just be prepared to supply more support to help the person succeed.

**The quantity of people on the sales force.** How many salespeople does it take to effectively cover our market? How often do we want to expand the sales force? Are support people (sales secretaries, telemarketers, etc.) needed? “Design” your sales force starting at the bottom, and work up.

While you’re designing, don’t overestimate. In the past, I’ve noted that one of the worst things a company can do is to “cattle call hire,” where they hire a greater number of salespeople than they can support and afford – figuring the good ones will survive and the bad ones won’t. Usually, the end result is the opposite. Good salespeople quickly figure this scheme out, and move on to better work environments. The ones that don’t achieve don’t have that option, so the employer ends up with a small, mediocre, and expensive sales force. Be diligent in interviewing and hiring, and hire what you need.

**Growth plans.** A good plan should cover revenue growth plans for at least the next three years, and should have a plan for hiring additional people as needed. With that said, there should be some basis for revenue growth (How much can each salesperson reasonably be expected to sell each year?), and sales staff growth (How many prospects/customers can each salesperson manage? At what level of company revenue can we afford new people?). A good sales plan will quantify all of this, and have certain objectives which trigger expansion. More salespeople do not automatically produce more sales.

Now here’s where it gets a bit tricky. First of all, good sales plans are *written, shared, and updated* frequently. A sales plan isn’t something that you lock in stone for the ages; it’s something that gives the sales force a direction, but with the understanding that the direction can change.

When you develop your plan, it should be in written form, and be something that you can share with your team. You might even want an 'edited' version if there is information that should stay at management level only, but each member of the team should have a copy of your sales plan and know how it is implemented, as well as their role and responsibility within it. You should be reviewing it at least annually – with your team's involvement – and be prepared to make changes as the competitive landscape (or, nowadays) the overall selling landscape demands.

One final thing to remember when it comes to sales plans. Don't let the perfect be the enemy of the good. Too many managers will get so wrapped around their individual axles developing the perfect plan that they are never able to move toward implementation. Action makes you money; planning establishes the action.

### Secret Three: Color Code Your People!

The first thing to ask yourself, as part of your checkup, is: *"How many of my people are capable of achieving my goals?"* I like to rate my salespeople in three categories: **Green**, **Yellow**, and **Red**. This may be obvious, but let me explain:

**Green** salespeople are salespeople who either are currently meeting goals and that we expect to continue to do so, or who are properly ramping up to meet goals (in the case of new salespeople or salespeople who have been on a performance improvement plan). These are the ones that you're not worried about; you'd still like to work with them to improve their performance, but you're not losing sleep over whether or not they're going to be with you. Your main task with these salespeople is to continue to develop their skills and work to retain them.

**Yellow** salespeople are in doubt. Their performance is not meeting goal, and you're unsure if they are capable of meeting goal. You should be troubleshooting these people; in fact, any salesperson who is Yellow should currently be on a Performance Improvement (or Probationary) Plan. These could also be salespeople who are new enough that they don't have an established performance pattern yet.

**Red** salespeople aren't going to make it. You've been working with them, and you realize that it's simply not going to work out. Projecting their achievement out into the future, they simply don't have a moment where they will reach goal. If you have any of these people, you should be in the process of releasing them.

Ideally, your sales force will be at least 60% Green. At most, you'll have 20% Yellow and 20% Red. When a salesperson crosses from Yellow into Red, they shouldn't be employed for much longer.

### Secret Four: Evaluate Your Salespeople Individually.

Now that you've done the big picture categorization, it's time to look at each one of your sales reps individually. Are you doing a formal evaluation on your sales reps annually? If not, this is as good a time as any to implement that process. If your company doesn't have an evaluation form that they use, there are several available on the Internet for a free download; get one and tailor it to your needs.

In looking at each of your salespeople, it's time to evaluate their performance with our two variables – Quantity of activity and Quality of activity. You should have sales activity metrics in place; if not, I'll discuss those momentarily when we talk about sales Processes.

Start with Quantity of activity. For each of your people, compare their activity numbers from the past year (use the entire year if possible; that levels out spikes from big weeks and small weeks) with your activity metrics. Are they doing enough prospecting calls? Initial Appointments? Proposals? If not, you know that there is untapped potential available simply by getting them up to standard. Don't neglect this with your top performers. Instinct is to leave your top people alone. Remember, however, that every call your top performers make is more valuable than your average performers, simply because it has a higher likelihood of turning into a sale. That's what makes them your top performers. If they're not maximizing their time, you are losing potential sales.

Evaluating their Quality of activity is tougher and more subjective, and it requires you to have put in your time in making joint calls with your reps. For each rep, create a strength and weakness matrix. What are they especially good at? What do they struggle with? What can you do to alter and improve their Quality of activity?

Again, don't neglect strengths. Sometimes it can be more beneficial and profitable to build on a strength than to fix a weakness, especially if the weaknesses aren't preventing them from hitting your goals. For Yellow salespeople, it's a bit different; you'll want to focus on fixing whatever weaknesses create a barrier to results.

Create a Professional Development Plan for each Green and Yellow rep (remember, the plan for Red reps is termination). Make it part of the evaluation we discussed earlier and work toward achieving those goals on a consistent basis. Yellow reps should have a deadline for hitting goal and making the transition to Green.

### **Secret Five: Build Your Metrics.**

You should be re-evaluating and validating your sales metrics at least once a year. If you don't have these, the simple version is that sales metrics are the amounts of each activity that your sales rep performs in a given time period (I prefer to manage by the week). I like to keep it simple by using: Calls for Appointments; Initial Appointments; Proposals; and Sales (sold deals). These are the major junctures in the sales process. Work backwards from number of Sales needed in a given time period and then use your expected ratios to get your numbers.

For instance, if you need one Sale per week, figure up your closing ratio from Proposals to Sales. If it's 50%, then you need two Proposals per week. How many Initial Appointments yield a Proposal? How many Calls get you an Appointment? It's not tough to get these numbers with a little bit of study. This creates a road map for sales achievement, as performed by a competent salesperson who can use these numbers to achieve your goals.

For those of you that have these numbers, you should be re-validating them annually. Your metrics are only as good as your ratios are accurate. Ratios can change over time; for instance, when voice mail became prevalent, it took more calls to get an appointment because salespeople were able to get ahold of fewer prospects by phone. Similarly, when the economic downturn happened, closing ratios on Proposals changed downward.

Once again, take the activity results of your **Green salespeople only** to re-validate the ratios and numbers. Are you seeing big changes in the ratios? It might be time to revise your metrics. Don't use Yellow or Red salespeople in this; this will skew your ratios downward. What we want is to mirror and match the results of your successful people.

One other word here – don't revise your metrics *down*, instead revise your goals *up*. For instance, if you're finding that your closing ratio is improving, the idea isn't to allow your salespeople to perform less sales activity. That means that your results (sold deals) should get *better*.

After you've terminated Red salespeople, don't worry about "the best time to hire." The "best time" to hire is always NOW. Get your hiring processes started.

### Secret Six: Hire Smart.

In terms of the health of your business, there are few things more critical than the ability of your salespeople to bring in profitable business, yet too many companies in the performance industry consider sales traits and skills last when hiring salespeople. If this sounds like you, you're not alone. This article is focused on helping you hire salespeople for the right reasons, and in the right way.

"Smart Sales Hiring" means just that – hiring with your head and not your gut. Studies by the *Wall Street Journal* have shown that, overall, 63% of all sales hiring decisions are made within the first five minutes of meeting the applicant. Yes, that's right – five minutes. What that means is that the owner or manager makes a snap decision that they *like* the applicant, and then all the things they do in the hiring process are designed to reinforce that decision. Not surprisingly, this results in a lot of bad hires and lower sales than could be achieved.

The first component of Smart Sales Hiring is understanding the order in which candidates should be evaluated. Think of candidates as having three main aspects; Traits, Skills, and Experience. Traits are those things that we just *are*; they make up our personality. Some traits contribute to selling success, and some detract from it. We want to hire the right mix of traits for our sales job, because those are things that cannot be trained or coached.

The second component of candidates is their Skill set. Skills are those specific job skills that the candidate has learned in their career, through training or work. In selling terms, the key skills are Dialogue (the ability to converse comfortably with customers), Questioning (the ability to ask the customers the right things to assess their needs and wants), Listening (the ability to mentally capture the information given them by customers), and Presenting (the ability to communicate product features and benefits). There are other important skills, such as detail orientation, follow up skills, and service orientation, but the four above skills are the basic building blocks of successful selling.

The final component is Experience. This component has to do with the candidate's past job experience, potential product knowledge, sales background, and accomplishments. Here is where a lot of hires go wrong. Hiring managers focus – incorrectly – on "industry experience" and end up hiring the bottom people in the industry (i.e., the people that your competitors are happy to get rid of). The textile services industry seems particularly prone to this syndrome; you'll find many candidates whose resume's have stints at multiple companies. Don't lock in on industry experience – instead, look for candidates who have strong B2B experience, particularly in a hunter role.

So, how do we discover these things in an applicant? First, we need to understand a few general rules of hiring:

**Smart Sales Hiring is a Process.** What's nearly as important as the people you *do* hire is the group of people you *don't* hire. It's easy to hire the wrong people, particularly in sales. Impulse hires are the enemy of good selling and good sales forces. To be successful in hiring salespeople, you need to have a hiring process that includes multiple types of contact and multiple types of communication coupled with some due diligence.

**Past Performance Tends to Be the Best Predictor of Future Performance.**

Yes, bad things can and do happen to good people – but they don't happen consistently and repeatedly. If a salesperson has succeeded in the past, they are likely to succeed in the future. The reverse is true, too.

**Traits and Skills are Transferable.** Many times, I have watched applicants for sales positions turned down because “they don't come from the industry.” That's silly on multiple levels; first of all, you have to enter the industry *somewhere*. Secondly, if a salesperson has the right combination of Traits and Skills to succeed at selling telephones, for instance, it stands to reason that they might have the skills to sell uniform rental programs.

**Never Hire From a Pool of One.**

In my experience, a vast majority of hiring mistakes come from hiring from a “pool of one;” in other words, someone walks in the front door, says, “I can sell,” and gets hired. Successful hires come from building a pool of people, comparing them for suitability, and letting the cream rise to the top.

**THE PROCESS**

As noted above, Smart Sales Hiring is a process. By taking a series of steps, you can eliminate inappropriate hires and hire the right people for your company. This process has proven successful in hiring salespeople across numerous industries, compensation levels, and types of salesperson – including the textile rental industry.

**Step One: Design Your Salesperson**

First and foremost, you have to decide what type of sales rep is appropriate for YOUR business. Do you need an outside salesperson, who is doing a lot of prospecting, or do you need someone who is more geared to managing current relationships and expanding business within current accounts? The “Account Development Rep” role is gaining popularity in this industry; do you want one of those, or a conventional prospector/hunter? How much can you afford to pay a salesperson? Remember – past performance tends to predict future performance. That means that ideally, you want someone who has succeeded in similar types of work.

Take the time to put all this information down on paper; doing so will save you a lot of time and pain later. You can't get what you are looking for unless you know what you're looking for first.

**Step Two: Build a Candidate Pool**

One of the biggest mistakes in hiring is hiring from the “pool of one.” To avoid having this problem yourself, start your search by letting people know that you are searching. That means advertising and posting your position wherever possible. My favorite job board is CareerBuilder, with LinkedIn coming in second (and closing

distance). Depending on your area, Craigslist.com or Backpage.com might be good (in some areas of the country, these can generate good candidates – in other areas, they generate nothing; in all areas, they are cheap enough to find out), and of course, don't forget TRSA as a way to publicize your opening.

When you write your advertisement, you need to remember that today's hiring is a marketing project. Your job is to sell potential candidates on why they should want to work for you, and your ad should reflect this. Job descriptions are fine, but you need to also market yourself in the same way you would market to potential customers. Critical things that should be covered: Why should anyone want to sell for you? To whom do you sell? What does the job pay (this saves a lot of time and pain later)? Your objective is to build a large pool of candidates. True, ¾ of your candidate pool will be so inappropriate that you will only screen their resume's and pass on them, but it's easy to say "no" to people who approach you. It's impossible to say "yes" to those who don't approach you.

### **Step Three: Pick Appropriate Candidates**

Resume' screening is the thing that most business owners hate about hiring, and is often what dissuades owners from doing a real hiring process. It doesn't have to be. You can eliminate inappropriate resume's pretty quickly by learning to scan, and what to scan for. By using a few guidelines, you can find the right people. First, you want to avoid job-jumpers. Remember the "past performance" guideline? This applies to job tenure, too. I'm going to assume that you want to keep someone for longer than a year, so don't hire people who have a track record of frequent changes. My favorite guideline is to stick with candidates who have had a stint of at least three years on the same job in the last five years. You can eliminate a huge part of the candidate pool right here. Also knock out candidates with obvious spelling and grammatical errors; there's nothing worse than trying to buy a part from someone whose e-mails read like a 13 year old girl's text messages to her BFF's.

Next, you're looking for candidates who have been successful in similar types of sales; that means that, as a general guideline, you should look for salespeople with a past history of success in new account sales for new account sales hires, and so on. To discover success, look for candidates who list achievements on their resume' ("top salesperson last two years;" "grew sales 30% annually," etc.) rather than simply listing job duties. Ideally, you want to know both duties and success. Finally – and I do mean finally – look for some sort of allied experience. To me, "Allied experience" means similar customer types, similar product types, etc. It does not mean "industry experience." The textile services industry has a large undertow of salespeople who move from company to company to company, without ever establishing success anywhere. If you're looking for "industry experience," you're probably the next employer to lose money by employing them.

### **Step Four: The Phone Interview**

In today's world, good selling requires good telephone skills. Whether your salespeople are primarily phone salespeople or whether they are outside salespeople, telephone work is essential to getting the job done. The easiest way to find out if your prospective new employees have phone skills is to put them through a short phone interviewing process. My phone interview consists of just a few quick questions, and it's designed for two things. First, I want to see if the candidate has a good phone voice and demeanor. Second, I want to see if they can quickly make the mental adjustment to a selling mode, because the point of the phone interview is to

sell me on themselves. All you need here are a few quick questions such as, “What makes you want this job?” and “Why would you be good at it?” This interview isn’t rocket science. Disqualify anyone who isn’t a good fit.

### **Step Five: The Initial Interview**

Now it’s time for face-to-face interviewing. Make the most of this opportunity. You can learn much about a candidate in the first interview – **but you must remain emotionally detached**. In Smart Hiring, your goal here is not to “like” or “dislike” someone; it’s to understand whether they are what they say they are. To do this, make a very careful review of the resume’. Every salesperson tells a story through their resume’, and some of those stories contain more fiction than others. To combat this, you need to trace through their history.

Ask detailed questions about each stop in their career. What did they make? How were they paid? What were their sales numbers? Did they receive any awards or recognitions? If so, can they prove that by showing you a letter or other award? What did they like least and best about each job? Have them describe a typical day; how does it fit with yours? Most importantly, as you probe the numbers, make sure that they all match up. Salespeople who lie typically don’t think the lies all the way through to their logical conclusion, which means that if the achievement and compensation packages don’t match actual earnings, something is wrong. **One lie equals disqualification**. You should also ask them to e-mail you three business references, along with a short paragraph about why they would be the ideal candidate for the job; review it for communication ability.

Here’s the best part about this interview: **People will tell you how they will fail**. The reason that so many bad hires are made is that we don’t listen. For instance, one of my clients interviewed a person for a prospecting sales position that mentioned in passing that his previous company had an appointment-setter who made his life much easier. They disregarded this information until I clarified for them that this meant that he was unlikely to prospect, and that to get a return on their investment in him (which would have already been large), they’d have to spend more money for an appointment-setter to ‘caddy’ for him. Ask tough questions....and then **listen** and **heed** the answers.

### **Step Six: Reference Checking**

You **MUST** check references. Studies show that 40% of all hires are completed without reference checking. That means that, if you are a candidate who can’t find anyone to say anything good about you, you still have a 2 in 5 shot at submitting three names that will never be called. Don’t let those odds work in the candidate’s favor; be the person who checks. You will be surprised at how many references don’t come back strongly. My rule is that I need at least two positives with no negatives (sometimes references don’t call back) to keep a candidate.

### **Step Seven: Get a Second Opinion**

To keep you from the impulse hire, you should have someone else get involved in the process. That means having another manager, friend, consultant, etc. interview the candidate. This is definitely one of those times when two heads are better than one, plus it helps to find out if the candidate can keep their stories straight. At the end of this process, sit down with the other person and narrow the pool. By now, you might be down to one candidate, or you might have a handful.

### **Step Eight: Third Party Assessment**

Now it's time to go where you can't through interviewing; inside their heads. As a final step, you should have the candidate complete a third-party psychometric assessment to discover their traits and suitability for the job (remember, traits are something that we can't teach). My personal favorite is the Profile Sales Assessment (PSA) by Profiles International, but there are numerous others. I've also had good luck with the SalesMax assessment. The important thing here is that the assessments are a measure of one's personality and suitability for the role, but they are free of personal biases.

Now, you have enough data to reach a hiring decision. Is it a lot of work? Yes. Is it spendy? It can be; by the time you do all the advertising and assessing, you'll spend around \$2-3,000 or more. In fact, reading (and writing) this article has been a substantial investment of time. But your company deserves the investment. **You will never get the right results with the wrong people working for you.** Do it this way, and the right hires will produce the right results.

### Secret Seven: Make Your Training Work.

Let's talk about how to make sales training work. In fact, let's back away a tad and talk about how to make ANY training work. Will that generate a bit of ROI for your time in reading this article? Hopefully, it will. Full disclosure; this article was inspired by a lunch that I had yesterday with a client who commented on how effective my training was. In retrospect, I have to say that part of what made it so effective was how the client handled it – and that's what I propose to pass along today. First, however, let me pass along the Dirty Little Secret of sales training:

**Almost any sales trainer can, and will, generate ROI for your company.** That's a big statement, I know, and there are certainly exceptions. But the reality is this: The economies of sales training are such that even the most expensive sales trainers can pay for themselves if just one person in the class takes what he learns and uses it to significantly up his performance. And I've taught very few classes where at least a few people didn't take the teachings and run with them. Again, there are exceptions; there are people out there teaching techniques that will actually generate negative ROI because the techniques, when implemented, actually make the customer uncomfortable and less likely to buy – but let's assume that we're talking about trainers who at least understand customer friendliness.

So, now that the Big Secret is out there (and I'll follow up on it at the end by giving you some guidelines on how to pick your trainer), let's talk about what YOU (whether you are manager or salesperson) can do to make training work for you.

**Preparation is key.** I wish I could tell you how many times I've walked into a room, looked around, and discovered that the salespeople have no real idea of why I'm there or what I'm there to do; they just know to show up at a certain place at a certain time. Don't be that guy. If you're a manager, **prep** your people on what will happen and what the expectations are. Much time gets wasted in these sessions just crossing the "Oh, this is training" hump. If you're a salesperson, don't just settle for a scheduled meeting; **ask** what will be happening and what the expectations are. It's your time, after all. Good trainers will inform you as to the program outline and plan when they are selling the business; make use of that.

**Professionalism is the most basic expectation.** When I was a sales manager and I sent my reps to training, I always did so with the expectation that they be on their most professional behavior; unprofessionalism was a reflection on me, after all. However, too many training programs (again, of any type) end up looking more like Romper Room than a business environment. Want to maximize the value of your money? Make sure your people are on their game when they're in the room, and that they are punctual when returning from lunches, breaks, etc. If you're the trainee, be the leader. Look at it this way: You're going to be there regardless, so if others' conduct is keeping you from learning, it's your right to call them on it. Is it the speaker's job to 'control the room?' To an extent – but I tell all my clients that I am a trainer and not a babysitter. If your staff requires a babysitter, that reflects on YOU.

**Focus on the “nuggets” - profitable behavior modifications.** As the training is going on, you will find elements that you have heard before. That's going to happen with any experienced worker going through any type of training. Training becomes unsuccessful when attendees focus in on those commonalities and stop looking for the differences. Virtually any training of any type, however, will have what I call “nuggets,” or ways to modify behavior that can be very profitable. I went to a training session for speakers a couple of weeks ago; 98% of it was stuff that I had heard and knew; I've been working the 2% for the last two weeks with some excellent results.

**Learn and reinforce.** There's no substitute for management that participates in the sessions and learns right along with their people; there's no substitute for when that management, having learned the lessons, continually reinforces that message when the trainer has left. My client yesterday said, “Our profit per stop is up significantly because of your training.” That's great, and I appreciate it – but reality is that it's up partially because of what I taught, and partially because the company has adopted those teachings as part of the culture, and has reinforced those teachings in the months since I was there.

Too many managers look at training – of any type – as a self-contained fix-all solution. It's not. Good training programs are incorporated into the culture of the company or department, and then reinforced consistently and when opportunity comes up. Training is designed to show the benefits of behavioral change; however, true behavioral change does not happen within a one-day or two-day window. It's consistency of management and follow up that really spikes the ROI.

**How do you pick a trainer?** So, I promised earlier that I would circle back and talk about how to pick a trainer. I'll do so now. To pick the right person for your needs, just follow these simple guidelines:

- **Pick someone who is expert.** There are a lot of 'seminar' companies out there who provide general-purpose speakers with prewritten courses to present. The training breaks down when the first person asks a question that starts with “Why?” Make sure your trainer can answer those questions through personal expertise.
- **Pick someone who is willing to learn.** Too many trainers come in with a 'program in a box' and end up not speaking your language. Good trainers build in pre-training time to learn the specific challenges and needs of your business.
- **Pick someone who fits your culture, or the culture you would like to have.** Training of any kind should set the tone for how things are done at your company; if the trainer is training a method counter to your

culture, it won't be effective. When it comes to sales training, I always tell my clients that sales training dictates *how you want your customers to be treated*; is the curriculum and approach a fit?

- **Finally, pick someone who is available post session.** I've heard horror stories about trainers who came in, did an outrageously expensive session, then when the manager or trainees have a question, he wants to bill a big amount just for answering. Make sure your trainer doesn't mind getting the occasional call or email post-session. I always tell my clients that they are free to call or email with questions, and if it gets to a point where I will need to bill for time, I'll let them know well in advance.

A well designed, planned, executed, and followed training session can be the best thing for you and your staff. A bad one can be a time waster. By following these simple steps, you can make sure that your training is effective.

### **Secret Eight: Implement Performance Reviews.**

Some concepts of managing people get old over time. Some, however, are both fundamental and necessary to the art and science of getting the most out of your people. One of those fundamental and necessary elements of management is the performance review.

The performance review, done at consistent periods, is the best way to answer questions that employees have about their own performance, as well as to answer questions that management has about the employee's job satisfaction. Let's face it; everybody likes to know where they stand. Managers that don't regularly review their employees leave their people wondering; the managers also cheat themselves out of the opportunity to assess the job satisfaction of the people working under them. It's also a great opportunity to coach and improve the performance of your people.

For the reviews to be successful, however, they have to be done *consistently* and *at regular intervals*. I've worked in companies before where reviews were only done when someone was "in trouble" – which is by far the wrong way to do it. That means that employees know that the review is simply a pretext to start the paperwork process of firing someone. It also wastes the positive aspect of being able to coach and change the performance of your people.

So, let's assume that you're on board, and that you want to review your people. How do you get started? Well, you can search and download review forms on the Internet (there are several), you can make up your own review structure, or you can do a combination. For instance, the review form that I provide to my clients began many years ago as a free download, but has been consistently tailored and tweaked over the years until the original authors wouldn't recognize it. Essentially, however, your review should have the following components:

**Quantity of Work:** Nearly every type of work performed can be counted and quantified, whether it's sales made, invoices entered, or even adherence to deadlines. What you're trying to measure here is overall work effort, output, and productivity.

**Quality of Work:** Just because the person does a lot of it doesn't mean that they are good at it. What's the quality of their work? Do they get the details right, or is there a lot of re-doing? This is your opportunity to help with work habits. The key equation to any job is: **Quality of Work x Quantity of Work = Results**. Or, to put it another way, the more you do of something and the better you do it, the more successful you will be.

**Internal Relationships:** Do they play nicely with others? Being a good team member is a big part of being successful as an employee – as a manager, how much time do you spend on solving internal squabbles surrounding this person, or are they trouble-free?

**External Relationships:** For employees that deal with people outside the company – customers, vendors, etc., how do they relate to those people? Are they good ambassadors for the company, or do they leave a bad taste in others’ mouths? It’s tempting here to focus only on customer relationships, but that’s only part of the picture; treating vendors badly is also detrimental to your company’s objectives. If you don’t believe me, try to get a favor at 2 A.M. from a vendor that you’ve mistreated in order to get the production line back up and running.

Those are the key measurements of an employee’s work habits. I prefer to use a scale, starting with low performance, of “Consistently Below Expectations; Sometimes Below Expectations; Meets Expectations; Sometimes Exceeds Expectations; Consistently Exceeds Expectations.” For each section, mark on that scale, and comment as appropriate.

Next, we need to talk about progress. Employee performance shouldn’t be linear. We want our people to always be getting better at what they do; two additional sections help accomplish this:

**Progress Since Last Review:** If the employee has improved since the last review – and particularly if they have accomplished certain goals – this is the place to state it. If, on the other hand, the employee’s performance has declined since the last review, note this here as well. Then....

**Goals for Next Review Period:** Every employee needs to have a personal development plan. While it’s tempting to focus on employees whose performance is substandard and use this section for corrective action (and if you have substandard employees, that’s exactly how this section should be used), it’s just as important to have goals for your top performers. Don’t settle for, “Great job, Steve, keep it up!” Instead, focus on ways that the employee can develop new skills, new habits, or even put themselves in line for a promotion.

The review meeting should be formal, and should have detailed discussion about the elements of the employee’s work. Be prepared with facts and figures as appropriate. Allow your employee to comment verbally and in writing. It’s also important to ask good questions about the employee’s job satisfaction; this is a chance for you to NOT get surprised by employees who are out looking for a job.

A good review program is essential to maintaining a high level of staff performance. Don’t skimp and your bottom line will thank you.

## Secret Nine: People Bank!

Did you ever wonder why some companies struggle to hire talent, and some are able to find the people they need, time after time? It’s not an accident. The best managers understand that they need to use every resource possible to build the talent level of their organization, and one of the best ways of doing this is what I like to call “Building a People Bank.” Put simply, a “People Bank” is a file of people that you have encountered, and that you think might make good additions to your company when the opportunity presents itself.

Building a strong People Bank isn't tough, but it is something that requires advance planning. The problem is that most companies only think of their hiring needs when they actively have an open position to fill. But, as Mom used to tell us when we were dating, oftentimes we find the right person when we're NOT looking! A People Bank is a good way to make sure we are in a recruiting mode all the time, and can activate the "bank" when we need someone. Building your bank is simple and involves a few steps:

- **Open up!** You can only build a People Bank by meeting people, and you can only meet people by opening up to new contacts. This means becoming an active networker, and noting the people that impress you. It also means being open to scheduling appointments with people (such as salespeople) who approach you in a manner that is both professional and impressive.
- **Get to know them.** Remember, the purpose of People Banking is to identify top talent and then reserve the right to approach them when you do have an opening. To do this, you need to have substantive conversations with these people; a 5-minute meet and greet at a function won't do the job. When people impress you, find reasons (even if it's just swapping ideas) to have more extensive coffee or lunch meetings where you can get to know them.
- **Ask for permission.** Approaching someone about a job opening can be unexpected and, in some cases, unwelcome. That's why you should ask permission. Once someone sufficiently impresses you, let them know. Something like, "You know, at ABC Company, we're always on the lookout for top talent. You just might be a person who would fit at our company down the road. When an opening comes up, would you mind if I/we called you?" Most of the time, the person will be flattered and give permission.
- **Think globally.** Don't just think about your own department; for instance, if you encounter great marketing people, refer the information to the proper department manager. That's just being a good teammate and helping them build their own banks.
- **Preserve the info.** Your People Bank should be kept at the ready. Whether you prefer business cards in a Rolodex or data in a database, you should have a place that you can quickly access to sort and find the right people.
- **Withdraw when appropriate.** When you do have an opening, it's time to reach out to people in your bank. HOWEVER – this should be part of a search process, not the whole of the search. Remember, we want the best talent available at any given time; measure your banked people against a candidate pool. Never hire from a pool of one.

Building a People Bank can be an easy and convenient way to, over time, greatly build the talent base of your company. It's worth the time and effort, and should get onto your "to-do" list as soon as possible.

### Secret Ten: Have a Great Sales Manager.

Now you're thinking, "Gee, if it was that easy, I'd already HAVE a great sales force!" Well, buckle in. Most companies don't have a great sales manager. Most companies have a mediocre or lousy sales manager and they don't even know it.

Great sales managers have one skill set that rises above others: **Great Sales Managers are able to effectively change salespeople's performance for the better.** Oddly enough, coaching and development tends to be the last skill set that business owners seek in a sales manager. They seek strong selling skills (great if you're really

seeking a Major Account Rep), or they seek strong administrative skills (awesome if you want a Sales Manager who sits at his desk and only counts numbers).

The truth is that the best sales managers are the best because their salespeople perform better under their tutelage than they do on their own. This is because those great sales managers constantly seek opportunities to coach and develop their people.

Ask yourself this question. “Can I think of an example of when my Sales Manager has effectively improved the performance of my salespeople?” If not, it’s time to do some more digging. Major Account Reps and administrative clerks are not difficult to find, but a great Sales Manager isn’t common. Make sure that you’re hiring for the right thing when you hire your Sales Manager.

We all wish that we could hit the ground running with 100% Green salespeople who are ready, willing, and able to knock it out of the park. For many of you, that won’t be possible – but now is a good time to take a look and see where you really are and put the right steps in motion.

## BONUS OFFER!

Thank you for downloading this report. As a special bonus for reading it (and implementing the solutions – you are going to implement, right?), I have an offer. Simply visit my online store at [www.TroyHarrison.com](http://www.TroyHarrison.com) to find a wide variety of books, audio and video courses, and other materials to help you build your sales productivity. They’re great deals already, but if you use the following code at checkout, you’ll receive **25% off** just for downloading this white paper!

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## Can We Help?

I’m Troy Harrison, “The Sales Navigator.” I’ve been helping companies like yours all over the United States build more profitable and productive sales forces since 2004. I can probably help you, too. Can you use one or more of the following services?

**Sales Training:** If your salespeople aren’t performing to their maximum, why not bring me in to show them cutting-edge techniques that will help them succeed in the Internet age? My “Sell Like You Mean It!” sales training programs has changed thousands of careers and built millions upon millions of profits for my clients. Maybe I can help you, too.

**Consulting:** Maybe you can benefit from my expertise in building world class sales forces. Whether your issues and needs center around issues like **compensation, management, hiring, performance tracking**, or other issues that face business owners and sales managers, I can help.

**Speaking:** Do you need a great speaker for your next meeting or event – one that will energize, electrify, and at the same time, educate your audience? I'm your guy. I've been called ***"One of the most engaging content expert speakers I have ever seen in action"*** by the iconic Patricia Fripp, a Hall of Fame speaker, and I can develop and deliver sessions that your attendees will talk about for, well....until the next time you book me!

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