

The Balance of Sales Leadership

Whitepaper

Includes the Sales Leader
Self-Assessment



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Our Customers Have Changed

In the last 10-to-15 years our customers have completely changed how they behave.

They have changed how they buy. In most customer buying journeys that require them to talk with a sales person, about 60-70% of their buying journey is complete before they talk with you. *What* customers need and want from businesses has changed. *When* they need it has changed. And *how* they need it (the experience) has also changed.

These are my top five ways in which customers have changed.

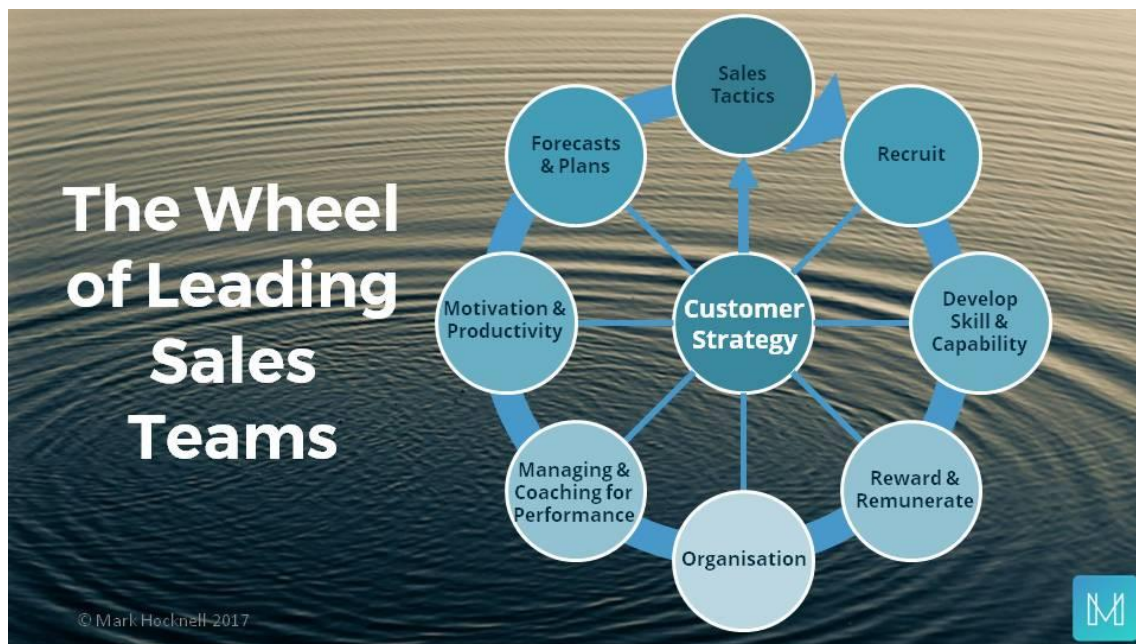
1. Customers are sales resistant. No one wants to be *sold* to. Anything that looks like, sounds like or feels like selling, and the customer's resistance rises.
2. This has triggered a self-service revolution. Customer want to do it themselves.
3. Customers have more information available to them than ever before - especially reviews from other customers. They will do their research, read the reviews of other people and decide for themselves.
4. Customer expectations are rising. Some businesses have really nailed the customer experience, so our expectations as customers have risen to the point where the experience a lot of organisations provide is not good enough.
5. We have entered into an experience economy, where customers are making their purchasing and advocacy decisions far more on their overall experience.

***We need to adapt our customer engagement practice to suit
the new environment.***

No longer can we take financial budgets and targets and use it as a the basis for managing a sales team. Challenging targets and internal competitions are the way of the last century. Our world has changed. Not only our customers but also what people want from their employers. Employees have changed how they feel about their work. Today it is up to the leader to *lead* the sales people. Set the scene for the optimal activity, build a team that shares and learns best practice. Let's now look at the Wheel of Leading Sales Teams as a model for helping to align our resources and maximise our results.

Leading Sales Teams

Leading sales teams has always been challenging, let alone in a dynamic environment. In fact leading sales teams is a balancing act. We need to get so many functions and components in balance to get the optimal results and outcomes. I use the Wheel of Leading Sales teams as a metaphor for getting that balance. The centre or hub, has to be the Customer Strategy.



The Wheel of Leading Sales Teams. This model is based on systems thinking, and the sales leader needs to ensure each of these functions are in balance across the wheel.

Key points:

- The *Wheel* is only a sequential process on the first implementation.
- Your Customer Strategy is at the centre and remains the central hub of all the activities of the sales team.
- The objective is to deliver the results needed for the customer strategy. This takes us away from product flogging and towards growing profitable customer portfolios, full of advocates of what we do.

- Coaching is a key part of the role of the sales leader which directly links to the motivation of individuals and teams.
- Problems sales leaders face are often *reflected* across the *Wheel*.
For example, if you have the team organised as Account Managers and they are regularly visiting existing customers, but your remuneration model¹ is one that is better suited to roles that need to find customers, then you will see problems in the motivation and productivity areas. Leaders often then try to fix these perceived problems with motivation and productivity solutions, but unless they address the root cause problem, they will make the problems and symptoms much worse.

How we lead sales teams needs a balanced approach.

¹ Remuneration models for account managers is best at 90% fixed pay and 10%, at risk performance based. Where the sales person's effort is about finding the right new customers, then at risk portion can be much higher.

The Customer Strategy

At the hub of the *Wheel* is the Customer Strategy. The Customer Strategy is an articulation of the results of the business strategy in the context of how this is achieved through your various customer groups. Often business strategies are based on achieving a set of numbers, revenue or margin targets. Sometimes these strategy documents will have some actions or approaches in them about implementing new products or getting into new markets. The Customer Strategy takes these objectives and converts them into a cohesive set of guiding principles, actions for the sales team, and an intent for each customer group. The Customer Strategy translates the business strategy and objectives into a playbook for the sales team.

In the example below (used in a B2B organisation with a national sales force), The Customer Strategy is built upon the values and goals of the organisation, and uses segmentation, but not only in terms of monetary value, but also in the context of the customer value attributes. This model of categorising customers allowed the business to focus the sales force on the customers that would be most responsive to their strategy, and importantly, not have sales people waste their time on customers that represent less value (or return) to the business.

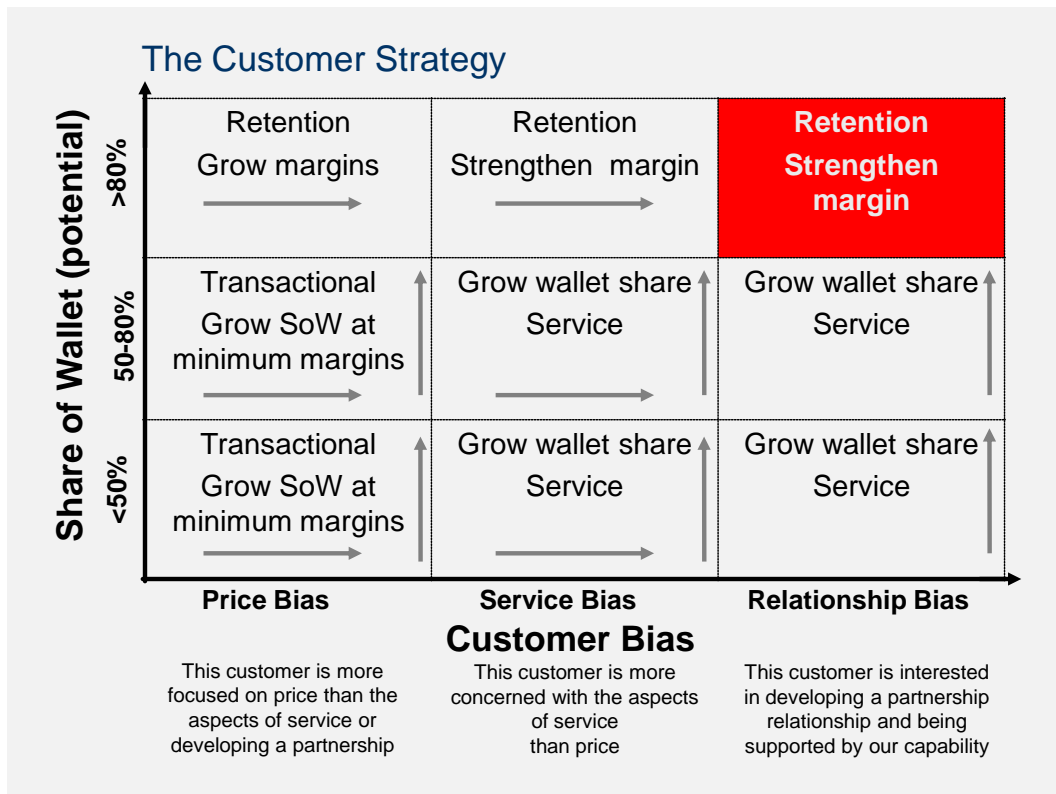


Figure 1: Customer Strategy Example

The Customer Strategy matrix (above) shows the Customer Bias on the 'x' axis and share of wallet on the 'y' axis. This matrix was then applied to specific customer groups with potential wallet size. The goal then (or strategy) for every customer is to develop a strong relationship with a corresponding share of wallet of greater than 80%. Customer groups were also split on the potential wallet size.

Using this approach every customer can be plotted on the matrix, therefore providing clear direction for the sales and service people in what to do with each customer and how to do it. This sales approach is then supported with a set of customer account planning tools and methods along with new customer acquisition processes. The Customer Strategy, guides the sales activity to ensure alignment with the organisational objectives and conjointly used by marketing to ensure efforts are aligned.

Other customer strategies might identify specific groups of customers that represent better value to the business (higher customer lifetime value and advocacy). These strategies determine the type of customer to engage with. Others may determine specifics about how the customer is on-boarded to ensure optimal two-way value.

Sales Tactics

Once the Customer Strategy is in place, the sales leader can then direct the sales team towards this aligned approach. The sales tactics are about finding the optimal way to deliver on the Customer Strategy. The key here is alignment. So much of sales practice is left to individual sales people and what they feel is the 'right approach', based on their experience.

Whilst the chosen tactics of *how* we engage with our customer is a collaborative approach, in the end it has to be determined by the sales leader. The sales leader is the one with the overview and with the responsibility for orchestrating the results for the sales team. These sales tactics are informed by the Customer Strategy and the goal then shifts to progressive improvement towards realising the results of that strategy.

Recruit

The sales leader ensures the position description (PD) is accurate, up to date and a candidate profile exists that reflects not only the characteristics, values, and skills of the good-to-top performers, but also the aptitude to deliver on the activity required to achieve the Customer Strategy. The sales leader needs to develop strategies to identify quality candidates and oversees the process of selection.

There is a significant cost to the business if the sales leader gets recruitment wrong. The PD can often be seen as more of an administrative task, however, for many candidates (and even recruiters) the PD defines the job to be done. Therefore, from a sales leader perspective the PD needs to be one of the key tools to, firstly deselect people who are not suited for the role and secondly, give confidence to those who are suitable. The candidate profile can also cover preferred levels of experience in a range of key capabilities, sometimes qualifications, a proven professional achievement orientation, but not always sales experience.

Develop Skill and Capability

It might seem a given that the sales leader needs to continually focus on the development of the skills and capability of the sales team. However, in the fast-paced, all-too-busy business world, many sales leaders neglect to realise this need of their team. Additionally, selling is a combination of algorithmic and heuristic task execution. Algorithmic tasks are where you follow a set of established instructions and steps to a conclusion as the algorithm for solving the problem. Heuristic tasks are opposite it requires experimentation and creating solutionsⁱ. Sales people need to learn the algorithmic skills and then apply heuristic capability to ensure each potential customer and customer feels a great experience.

Reward and Remunerate

"You should first pay sales people more than they are worth, then make them worth more than you pay them"ⁱⁱ.

Robert J. Calvin

The quote above is apt because it shows confidence in the selection and recruitment of sales people, and also shows that the sales leader's role is to develop the individuals in their team. The remuneration system is a hygiene factor² from a motivational perspective and further supports Calvin's quote, because if the sales person feels well remunerated then they get on with the job at hand. The remuneration system needs to guide the sales people to team-harmony, with a clear focus on the customer and their results. Sales leaders need to design the remuneration system that meets the needs of the sales person and the business, that delivers the required balance of motivation, quality and productivity, retains the top performers, and attracts quality candidates from the market.

Sounds easy right..?

² This is reference to Frederick Herzberg's research on motivation in the workplace in the late 1960's and his two-factor theory, where hygiene factors are considered sources of work dissatisfaction.

Money is not the universal motivator and incentive, it is the remuneration for the work done, a hygiene factor. Recognising this, sales leaders can focus people on the value of their work, making the activities and work rewarding, recognising the specific behaviours and actions that produce the desired outcomes.

"Salespeople have a genius for doing what's compensated rather than what's effectiveⁱⁱⁱ."

Neil Rackham and John DeVincentis

Organisation

Here the sales leader is concerned with the structure of the sales force to ensure the most effective channel and resource allocation is utilised. Market segmentation can be used to focus the sales force on regions, industries or specific customer groups. Additionally, the sales leader has a communication system in place and ensures administration demands on the sales force are minimised. By knowing each one of their people, it is the sales leader who has the overarching view of optimal approach. Therefore, guidance can be provided between the time allocated to customer analysis, prospecting and selling time. From a design perspective, the structure is always best where it is centred around how the chosen customer buys.

The sales leader will need to examine these activities and then choose how and where the activity should be delivered. Potential role choices include:

- Inside sales teams made up telesales, counter-sales, prospectors, marketing campaign coordinators or even sales appointment setters that will maximise the sales person time in the field by managing their calendars
- Outside sales people, new customer acquisition focused, existing customer management or account managers, or pre-sale technical people, sales teams focused on demonstrating capability
- Some businesses use external agents or intermediaries that find customers or manage customer on behalf of the selling business.

The objective of sales force design is to maximise the resources available on the optimal activity³.

Managing and Coaching for Performance

Managing performance can have all sorts various connotations today. Typically it is where we hear of someone who is being 'performance managed'. We will get the message that the individual is receiving a series of warnings, or they are being scrutinised to meet certain targets or they will be exited from the business. Based on this I prefer to use the term '*coaching for performance*', as sales leaders need to be in the coaching role for (at least) 80% of their time, and if needed turning to managing the performance of an individual occasionally. By taking this *coaching* focus the sales leader will actually engage with and raise the performance of the whole sales team.

By taking a *coaching for performance approach* the sales leader will:

- Be following a process that achieves the business goals,
- Motivate the sales team by engaging in the core motivational drivers of the team (see next section),
- Create action plans and develop the capability of sales force skills,
- Identify and manage poor performers early (actually with this process, poor performers are more likely to exit the company early before it gets to 'managing performance'),
- Provide recognition for effort and results,
- Reinforcing key behaviours and share best practices across the team.

To understand the basics of how this approach works we will look into the *triad of the emotional contract* and the structured one-on-one process.

³ You can read more about my approach to developing the optimal activity for engaging with the right customers on this [page](#) of my website and under the heading *Profit by Design* and *The Architecture for Customer Engagement*, or more on this [blog post](#).

The triad of the emotional contract

There are three contracts in place for each employee.

Firstly, there is an employment contract between the organisation and the sales person, the second is referred to as the "psychological contract". The psychological contract is the reciprocal extension of trust and discretion that creates a social exchange of obligations extending beyond those of economic exchange in the employment contract. The psychological contract is how the team member feels about working for the organisation, are they proud of where they work..?

However, most leaders ignore *the triad of the emotional contract*, the third and possibly the most important contract. Understanding this mental-model helps sales leaders realise their responsibilities towards the sales people and provides the mindset to develop effective, behavioral based relationships with their people. The reason most people leave a role is the declining quality of the relationship between the person and their manager/supervisor. *"People don't change jobs, they change managers or supervisors..."*

The *Triad of the Emotional Contract*⁴ describes the framework for establishing a relationship based on trust between the team member and team leader.

⁴ There is more on the next page - but also get across to this [page](#) my website to learn more about the whole process of: *Coaching for Performance: the complete how to guide for managers and leaders to engage team members through structured one-on-ones.*

To develop a healthy emotional contract with their team member, the leader needs to proactively set up opportunities to:

1. Establish ongoing, two-way communication, that
2. Gains agreement on the specific standards of performance and (over-time) provides feedback on performance
3. Offer opportunities for the development of skills and knowledge.

The Triad of the Emotional Contract



***Supportive management focusing on behaviour, actions and outcomes
creates a foundation of trust.***

This model is best implemented through having regular one-on-ones with each team member. 20-30 minutes every two or three weeks, it is the frequency that makes this work.

Motivation and Productivity

Motivation is often one of the first topics raised when it comes to talking about sales people and teams. It is almost as if everyone recognises the problem, but not a lot is done – systemically - to address the challenges sales people have with staying *motivated*. Motivation then, is almost always linked to productivity, if results drop, if the activities are not getting done then frequently we see that a "gee-man" is called in to boost motivation, a new training program, or there is 'team-event' to get things rolling again.

In reality all the sales leader needs to do is understand their people, use effective leadership, coaching and management to make the work meaningful, and in turn ensure the environment allows the sales team to be motivated and productive over the long term. The Sales Leader is an agent for change and continually improves processes and administration.

The basics of motivation and individuals needs

Abraham Maslow^{iv} (1943 and 1954) developed the popular theory of a hierarchy of needs, the higher order of needs being self-actualisation and esteem and the lower order being social, safety and physiological needs. The Physiological needs address the most basic of needs such as, food, water shelter etc. Safety then looks at the needs for security and protection in the events of daily life. Social needs bring in the need for belongingness. The human need for love, affection, and a sense of identification with other people. The next two Maslow refers to as the higher-order needs. The need for esteem of others, respect, prestige recognition, self-esteem and a personal sense of competence. The highest level is self-actualisation which is the need to fulfil one's self, to grow and use their abilities to the fullest extent. As a theory this useful in recognising there are different needs, however, it is rare that the needs literally move up the hierarchy in a step fashion.

Clayton Alderfer's ERG theory^v categorises needs into **e**xistence, **r**elatedness and **g**rowth needs. Existence needs are about the desire for physiological and material wellbeing. The need for relatedness is the desire for satisfying interpersonal relationships. Growth needs are concerned for the ongoing personal desire for personal growth and development.

Whilst Maslow's theory suggests that, as a person realises their first level of needs they look then to the next level, Alderfer contends that more than one need can be activated

at one time. By having all the needs operating simultaneously, the ERG theory seems to be a more useful model for understanding the sales persons motivational needs than the Hierarchy of Needs.

The ERG theory reminds us that people have needs and that drive their motivational forces at three, concurrent levels that relate to survival, personal relationships, and, personal growth and development; existence, relatedness and growth.

Jobber and Lancaster^{vi} (2012) present research on the top motivating factors for sales people, with the top two being; 1) *individual meetings with supervisor to discuss career, job problems etc*; and 2) *Regular accompaniment in the field by the sales manager*. These two factors also appear to support the ERG theory, where these both are about the sales person's relationship with their supervisor (Relatedness) and success in the role (Existence) and learning from the sales leader (Growth).

The previous sections on the *Triad of the Emotional Contract* and the *Coaching for Performance* approach each build upon the ERG needs of the sales person, as well as supporting the development of a trust-based relationship with the sales leader that is about achieving standards of performance and continual improvement. This is the core framework for ongoing motivation within the sales team.

Goal Setting

Now with this background, let's discuss goal setting.

Goal setting is defined as the process of developing, negotiating and formalising the targets or objectives that a sales person is responsible of accomplishing^{vii}. The theory says that specific and difficult goals can lead to higher performance. We typically see this today in the forms of KPIs (that are actually a performance measure and an associated target).

The goals themselves should be developed in a consultative and participative approach, with a focus on continually gaining feedback to monitor how the people are reacting to the goals. Goal setting should be done collaboratively, we know that if the goal is more specific it is more likely to be achieved, likewise people need to receive feedback^{viii} on how they are progressing towards the goal to keep them motivated.

Research has also shown there are three key factors^{ix} that influence the success of goal setting as a strategy for motivation.

1. Goal commitment from the sales person - that is, how committed is the team member to the goal itself
2. Adequate self efficacy and the willingness of an individual to produce output, supported by the self-belief the person has that they can achieve the goal, and
3. The national culture of the people (for example, Americans and Singaporeans tend to be particularly goal focused) and by extension, the work culture.

So in terms of motivation in practice, a lot of it comes down to the behaviours of the sales leader and if they can create an environment within the team that supports the ERG needs of the sales people. Using techniques like the *Coaching for Performance* approach will support the three motivational needs as well as building trust, but we also need to collaboratively set targets and provide support in the attainment of the goals.

Again Jobber and Lancaster (2012) quote research into what motivational factors Sales Leaders value highly, the top two being, competitions/prizes and incentives based on target setting. Looking back on the previous page at the top two motivators for sales people, we can easily see why motivation is one of the key topics of discussion in sales.

Alignment problems in motivation will reflect in symptoms across the *Wheel of Leading Sales Teams*.

Positively motivated behaviour *"depends on three nutrients: autonomy, mastery and purpose. It is self directed...devoted to becoming better and better at something that matters. And it connects to that quest for excellence to a larger purpose... Science confirms that this sort of behaviour is essential to being human - and that now, in a rapidly changing economy, it is also critical for professional, personal and organisational success of any kind"*.

Dan Pink^x

Sales competitions

So within the context of motivation and productivity, let's make one thing very clear. For the sales leader to keep the team motivated and productive to the optimal level, there is one key principle: *competition needs to be external to the sales team. Competition and rivalry only belong in the market place, not within the sales team.*

It is common practice for sales managers to run sales competitions, there are three central myths^{xi} that managers use to justify competitions. Firstly, they say competition is part of life and human nature, second they say competition motivates the team, drives a focus on attaining targets and that it is a way to have fun at work. Lastly they will say the competition builds character. These myths have been conclusively busted by a significant number of behavioural and motivational theorists.

"Competitions trivialise the nature of teamwork and turns it into a set of behaviours used to achieve victory. When organisations set teams against each other in some kind of contest, the message is that the only reason for a bunch of people to work together effectively is so they can defeat another group of people working together...rewards and punishment are two sides of the same coin..^{xii}."

Alfie Kohn

But leaders will often take the 'sales competition short cut', perhaps just for the sake of doing something. I confess I have run many sales competitions in the past and it is only from researching and reflecting on this topic that I realised that there are four key issues with this practice.

1. Competition breaks teamwork as sales people are encouraged to compete with each other. Consider the research in this section on what drives positive behaviours and actions, Likert's^{xiii} work with sales teams, the need for the team to work together, collaborate, share good practice and success stories. Sales competitions break this bond and minimise the human needs within the ERG theory, rather than building upon them.
2. In most cases the team will know who will win – it's the same few each time. It is either the better sales people, or the ones driven to win at any cost and they will ensure they do win. Manipulation of the system or the measures to win is the goal (hold back sales, push forward) putting their needs above the needs of the customer. Competitions do not motivate the whole team only a few.

3. Competition drives the wrong behaviours. It does not build best practice sharing, coaching, nurturing of the new sales people, or the 'rank and file' team members. Competition drives complacency among the core members of the team - not the super stars because they get extra rewards from this - but the core team members that do a good job, day in day out. For these core team members, it often reduces their confidence in the sales manager.
4. Competition creates winners and losers within the team. Instead of the sales manager creating a team of winners all feeling adequately rewarded and recognised, there are a couple of winners and a lot of losers. Surely not what we set out to achieve...

Competition needs to be external not internal. The focus of the sales team needs to be on their prospects and customers, to edge off approaches from rivals and competitors. Selling is a tough enough environment as it is without creating competitive tensions within the sales team.

And yet sales leaders continue to run internal competitions...

Misalignment is what happens when sales leaders depend on sales competitions to motivate the team. They rupture relationships within the group, foster poor sharing of information, perpetuate distrust and more often than not, encourage gaming of the performance measures. Problems that will present as symptoms across the *Wheel*.

If we must have sales competitions, then let's ensure we have a focus on building teams, on building skills, creating many more winners than losers.

Forecasts and Plans

In terms of forecasting and planning the sales leader needs to collect objective and subjective information to develop a sales force micro-plan. Additionally the sales leader will need to provide upward-leadership in the business and manages the gap between the sales force, marketing and corporate goals. Much of what needs to be covered in a sales force plan and forecast will be informed by the Customer Strategy. However if the organisation does not have a Customer Strategy, then the sales leader will need to fill this gap prior to working on forecasts and plans.

The Customer Strategy will provide a guide to the types of customers to be acquired, retained and perhaps those not to be pursued. Detailed Customer Strategies will also provide context into the Customer Lifetime Value⁵ and therefore guide the value that the organisation will realise from those customer groups.

Essentially the purpose of planning is to guide the activity of the sales team towards predefined and agreed goals. Without a plan, results achieved happen by accident, the sales team are likely to feel they have no direction and with little direction the motivational aspects of making progress are lost. Additionally, developing the sales plan (whilst often seen as a chore) can in fact help bring the sales team together to improve cooperation and coordination of the selling activity, as well as providing opportunities to collaborate across the broader business.

Sales forecasting and planning methods abound in sales management text books, ranging from top down, autocratic approaches to the bottom up planning techniques. These approaches will also include all sorts of quantitative and qualitative forecasting techniques⁶, which all sound reasonable in theory and do have a place when, perhaps, the business is a start up. However in practice, based on whatever rationale, the sales leader is often in a situation where they have a dedicated set of resources, a budget constraint to work within and sales target that is often a number, higher than the previous period. Planning and forecasting in this context is, firstly about working out how to align the resources to maximise the results, and secondly about implementation. Most planning is done so that we can learn from what is working and

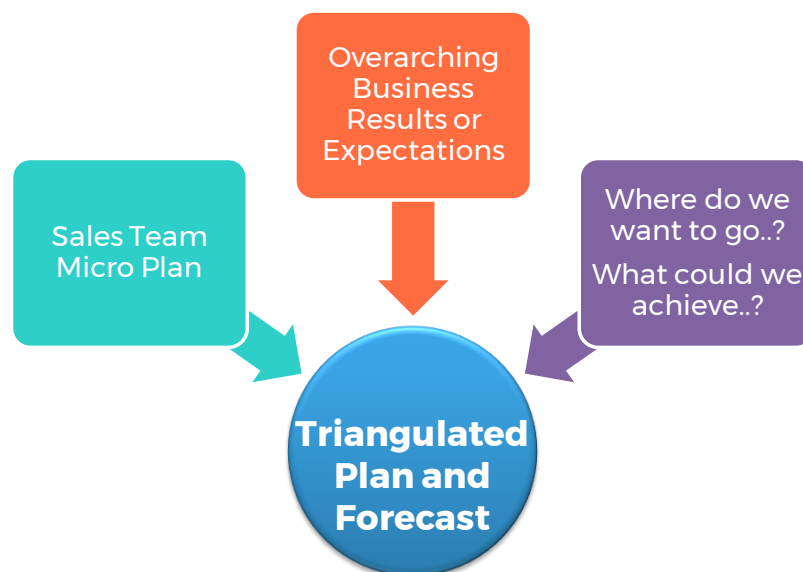
⁵ CLV is a discounted cash flow method to understand the value of a particular type of customer. CLV is derived from, estimating the margin of a customer (revenue less costs), the retention rate of the customer group, then 'discounted' (similar to NPV calculations) read more about CLV [here](#).

⁶ Such as work load methods for account/territory management, time series and historical forecasting that applies flawed moving averages methods that apparently gives "exponential smoothing".

what is not⁷, therefore implementation is not about sticking to the plan, but working the plan and learning what works best.

So with this said let's briefly look into the components of a triangulated planning and forecasting approach.

Triangulated Planning and Forecasting



The sales leader combined these elements to create the plan and forecast.

Sales Team Micro Plan

The first step, typically, is to develop a plan from the ground up, based on knowing the sales people and the customers. The following example of the steps for a territory based, national sales force should provide a basis for the development of a Sales Force Micro Plan (called micro as it is build from the smallest point, each customer).

1. Territory Manager to understand sales history for the corresponding period last year.
2. Take into account any variations based on planning for current period.
3. Customer Account Management Plans with key customers, using the Objectives of these plans - what additions are there for the forecast.
4. Take into account any budgetary expectations
5. Review with Regional Manager.
6. Finalise Branch level 3-to-6 month forecast.

⁷ Reference here to Action Learning Cycles

7. (Review monthly for accuracy, apply learning to revised forecast.)

From here the regional managers can combine to create the national, sales micro plan.

Overarching Business Outcomes or Expectations

This part of the process is for the Sales Leader to understand what the business is really expecting from the sales function. In lieu of these being reflected in the Customer Strategy, the expectations can be described as:

1. Results to be achieved - such as dollars, revenue, profit, cost targets etc
2. Customer markets to break into or to achieve increased penetration
3. Regions to be entered
4. Other outcomes to be achieved, such as Net Promoter Scores, collaboration with Marketing and such like.

Where do we want to go..? What could we achieve..?

This is where the sales leader, probably supported by key people within their team, could create a view of what they would like to achieve, or where they would like the sales team to be - not based on current performance - but on looking at the market, customer segments and marketing and sales functions and designing something from a blank canvass. This is to think beyond current boundaries and creatively develop possibilities. Once developed the possibilities can be assessed, evaluated and prioritised for potential implementation - or more likely for further testing, learning and applying.

From these three components the sales leader can develop a Plan and Forecast for the sales function that not only meets various needs, but is soundly based on current knowledge of customers and creative ideas to be tested and applied.

Summary - your call to action..!

Start work today on getting the right balance in your sales team.

Leading sales is managing a system.

The *Wheel of Leading Sales* outlines the key functions of the system that is made up of parts, with people being the connector across all parts. How this system of sales all comes together - and operates in balance - is the key to the understanding how the results are achieved by the selling activities of the business. This understanding then enables the sales leader to fine-tune and continually improve the customer engagement system to achieve the Customer Strategy. However, sales managers often get addicted to fixing symptoms rather than addressing root cause problems (Shifting the Burden^{xiv}), which in turn causes more symptoms to fix.

The role of the sales leader is to ensure the wheel is in balance, to align resources and maximise the achievement of results.

Lastly, consider your behaviours, habits, words and deeds. Are each of these demonstrating to your team that you are committed to continuous improvement, and empowering the team to learn and grow..?

The time to act is now.

About the Author

Mark Hocknell

Mark has 25+ years experience spanning corporate leadership roles, academia and consulting. The last 13 years in management consulting delivering more than 200 client engagements and a further 15 years in senior management, mainly at Suncorp. In addition to this, Mark has nine years (part-time) experience as a sessional academic with QUT in the Graduate School of Business, where he developed the Sales Management, and Customer Relationship Management courses. In 2013 Mark was asked to join the Industry Advisory Board (Marketing) for the Griffith University School of Business and in 2015 he was appointed as an Adjunct Lecturer and developed the Selling and Sales Management Course (2038MKT).



Mark has a MBA, holds qualifications in change management, and certifications in Net Promoter Score and PuMP® (the Performance Measurement methodology). Today Mark is a pragmatic consultant, author and speaker who applies a natural business talent together with a broad set of methodologies and deep experience to bring about results and demonstrable change within the organisations he works with. He is also the PuMP® Partner for Australasia.

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ⁱ Pink, Daniel H. (2009) *Drive: The surprising Truth About What Motivates Us*, Riverhead Books

ⁱⁱ Calvin, Robert.J., (2001), *Sales Management*, McGraw-Hill, New York

ⁱⁱⁱ Rackham and DeVincetis (1999)

^{iv} Maslow, A.H., (1943), 'A Theory of Human Motivation', *Psychological Review*, vol 50, pp370-96. and, Maslow, A.H., (1954), *Motivation and Personality*, Harper and Row, New York.

^v Wood, J., Wallace, J., Zeffane, R.M., Schermerhorn, J.R., Hunt, J.G., and Osborn, R.N., (2001) *Organisational Behaviour*, John Wiley and Sons Ltd, Milton

^{vi} David Jobber and Geoff Lancaster, *Selling and Sales Management*, Tenth Edition (2015) Pearson Education UK

^{vii} Wood et al (2001)

^{viii} Jason Fox (2014) motivation is about having a "clear sense of progress"

^{ix} Ibid

^x Pink, Daniel H. (2009) *Drive: The surprising Truth About What Motivates Us*, Riverhead Books

^{xi} From Alfie Kohn who wrote a couple of books on this topic, this one: Kohn, A. (1992) *No contest: the case against competition*, Houghton Mifflin, New York; and many articles such as: 'Why Incentive Plans Cannot Work', *Harvard Business Review* Sept-Oct 1993

^{xii} Ibid

^{xiii} Referenced in Jobber and Lancaster, *Selling and Sales Management*, Tenth Edition (2015)

^{xiv} This is based on Systems Thinking and Peter Senge's work in: *The Fifth Discipline* (1990), Random House Australia; and Senge, Peter; Ross, Richard; Kleiner, Art; Roberts, Charlotte and Smith, Bryan (1994) *The Fifth Discipline Field Book*, Nicholas Brealey Publishing

The Wheel of Leading Sales Teams breaks down this function into the key areas where competence is required to lead and manage the sales team for maximum results.

These functions only operate in sequential steps when first establishing a new sales team. When the sales team is in existence these functions are interdependent, each task has to build upon the others to be truly effective.

In this interdependent manner the functions can be seen as the spokes of a wheel, at the hub of the wheel is the Customer Strategy for the business. Each of the functions needs to be in balance with each of the parts, so that the whole is greater than the sum of the parts. The values of the business are infused in how the work is done.

This self-assessment describes the key criteria for each of the nine areas of the Wheel.. Your task is to rate how you feel you are meeting each of the criteria. A rating of 0 means it does not describe your business at all. A rating 10 means you have got it nailed. Maybe you are somewhere in between.

THE WHEEL OF LEADING SALES TEAMS



*Once completed ask yourself :
“what are the areas we need to work on first..?”.
Would your team share the same assessment as you..?
Try the assessment as a group discussion.*

The Sales Leader's Self- Assessment

The Nine Areas of The Wheel for Leading Sales Teams	Assessment Criteria	Self Assessment Score Does this describe you..? No, give it a 0., Absolutely, give it a 10.
1. Customer Strategy	A detailed Customer Strategy guides the types of customer we want to acquire and the type of relationship we have with those customers when they are part of our customer portfolio.	
2. Sales Tactics	We have defined the optimal Sales Tactics to achieve the Customer Strategy. We monitor, measure and finetune our tactics	
3. Recruit	We have clear position descriptions and candidate profiles that match the delivery of the Sales Tactics – we recruit people to these roles (competency and aptitude).	
4. Develop Skill and Capability	We have an induction program. Our skill development efforts are always aligned with the competencies needed to deliver the Sales Tactics. Coaching is a key focus for the Sales Leader.	
5. Reward and Remunerate	The remuneration system that meets the needs of the sales person and the business. It delivers a balance of motivation, quality and productivity, retains the top performers, and attracts quality candidates.	
6. Organisation	Segmentation and structure allows for optimal channel and resource allocation and is aligned with how customers buy. Admin demands are minimised, maximising analysis and customer contact time.	
7. Managing and Coaching for Performance	The Sales Leader uses structured 1:1's and coaching methods to ensure ongoing two-way dialogue around agreed standards of performance, and personal development. There is trust between the Sales Leader and each individual that make up the Sales Team.	
8. Motivation and Productivity	Motivation is seen as long term and based on relationships. The Sales Leader is an agent for change and continually improves the work environment.	
9. Forecasts and Plans	Objective and subjective information is collated to develop a sales micro plan. The Sales Manager provides upward leadership in the business and establishes productive relationships across the business.	