

# Sales Management

## Workbook



**Thrive** *Vance*

# Index

1. Introduction .....	Page 3
2. The Pivotal Skill .....	Page 4
3. Managing and Leading Assessment .....	Page 6
4. Planning for Success .....	Page 7
5. The Sales Plan .....	Page 11
6. Interviewing and Selection .....	Page 14
7. Communication for Results .....	Page 15
8. Strategy and Positioning .....	Page 18
9. Sales Training .....	Page 20
10. Motivating Others .....	Page 22
11. Coaching .....	Page 24
12. Time Management .....	Page 27
13. Leading the Action .....	Page 30
14. Notes .....	Page 33
15. Action Plan .....	Page 34



# The Pivotal Skill

Sales management is a crucial position in any organization. The sales manager role will have to substantiate the company's competitive advantage in the market by leading a high-performing team.

## 1. What are the requirements of a sales manager ?

---

---

---

---

---

---

---

---

---

---

**What does it mean to you to be part of a sales management team?**

---

---

---

# The Pivotal Skill

2. What one action are you going to take immediately based on the topic of discussion in this section?

---

---

---

---

**NOTES:**

# Managing and Leading

Assess your readiness with regards to the seven areas of successful sales management (1=lowest, 10=highest).

## Vision and Values

How clear are your vision and values?

1 2 3 4 5 6 7 8 9 10

## Key Result Areas

Are the key result areas well-defined?

1 2 3 4 5 6 7 8 9 10

## Standards of Performance

Are the standards of performance well-defined?

1 2 3 4 5 6 7 8 9 10

## Critical Success Factors

Are the critical success factors well-defined?

1 2 3 4 5 6 7 8 9 10

## Limiting Steps

Have you identified what is limiting your teams' results?

1 2 3 4 5 6 7 8 9 10

## Core Competencies

Are the core competencies well-defined?

1 2 3 4 5 6 7 8 9 10

## The Winning Edge

How effectively do you incorporate the "winning edge" concept?

1 2 3 4 5 6 7 8 9 10

# Planning for Success

Creating a well-structured sales plan is one of the key success factors for a sales manager that enables the sales manager to obtain expected results. It is of utmost importance for a sales manager to get their teams' buy-in for a smooth and successful execution of the plan.

- 1. The process of planning entails 3 steps, identifying *what* needs to be done, determining *how* it will be accomplished, and scheduling *when* it will be completed. Give two examples of things that need to be done in your current organization and complete the process by determining how and when these should be completed.**

	WHAT	HOW	WHEN
A.	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
B.	<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>

- 2. Analyze your market.**

- A. What is the total potential in your market?**

---

---

---

- B. What percent of that market can you expect to realize?**

---

---

---

# Planning for Success

**C. How much growth do you expect from your current clients?**

---

---

---

**D. Do you expect a reduction in sales from your current clients? Name the clients that are moving to a competitor, are downsizing or are going out of business.**

---

---

---

**E. Develop a sales forecast for each of your product lines. It should be a quarter, semi-annual and annual forecast.**

---

---

---



# Planning for Success

**3. What is the average size of each sale in your forecast?**

---

---

**How many sales must be made for your to achieve your overall goal?**

---

---

**How many sales must each salesperson average?**

---

---

**How much communications (calls, emails, etc) are needed to complete each sale cycle?**

---

---

**Over what period of time should a sales person close the sales?**

---

---

# Planning for Success

Based on the questions above, have you reached an achievable plan? If not, what are you going to change in your plan to make it achievable?

---

---

4. What resources do you need to execute your plan? Are the resources available to you?

---

---

---

---

5. Based on the topic we have covered in this section, what action are you going to take immediately to achieve your plan?

---

---

---

**NOTES:**

# The Sales Plan

Visualizing the *big picture* and planning for the realization of that vision is a key skill for a sales manager to be able to translate opportunities into a blueprint for success. Taking ownership of the responsibilities and plan for not only every day tasks but also the future opportunities will guarantee success for a sales manager.

- 1. What methodology do you use to assign sales quotas to your salesforce? Do you get commitment from your sales team to meet the quotas?**

---

---

---

- 2. What will need to change to get more commitment from the team to meet the sales quotas?**

---

---

---

- 3. What is more important efficiency or effectiveness? Please give a logical and substantiated example.**

---

**NOTES:**

# The Sales Plan

*“... Sales quotas are one of your largest responsibilities. They are the standards by which you and your team will be evaluated. They can motivate your team to reach for higher goals and performance or they can demoralize individuals. Improperly handled assigning of sales quotas can be the source of problems, frustrations and wasted energy. Properly handled sales quotas can mean superior achievement and highly motivated salespeople.”*

*Brian Tracy*

**4. What are the critical success factors (CSF) in your sales environment? List at least five.**

- A) \_\_\_\_\_ D) \_\_\_\_\_
- B) \_\_\_\_\_ E) \_\_\_\_\_
- C) \_\_\_\_\_

**List your team members and place their weakest CSF next to their name:**

<b>Team Member</b>	<b>Weakest CSF</b>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Where should you focus your next training?**

\_\_\_\_\_

\_\_\_\_\_

# The Sales Plan

5. What is the process you use to audit your team? What are you auditing?

---

---

---

---

6. What action are you committing to take immediately based on the topic of this section?

---

---

---

---

**NOTES:**

# Interviewing & Selection

As your level of success is directly determined by your team, having a well thought-out hiring plan to ensure you hire the best candidates. The hiring decisions are one of the most important ones you make as a sales manager.

- 1. List the five most important qualities or characteristics of the perfect candidate for your team:**

---

---

---

---

---

List a few qualities or characteristics you can do without.

---

---

---



# Communication for Results

Communication skills are some of the most important skills for a sales manager to possess. It is essential to your success to communicate clearly to empower others on your team.

1. Do you recall some mistakes you've made in the past communicating with your team?

**Listening mistakes?**

---

---

---

---

---

**Talking mistakes?**

---

---

---

---

---

---

---

---

---

---

**Other mistakes?**

---

---

---

---

---

*“...When we allow ourselves to quickly judge, we close off all the channels of communication, we don't hear or see the messages but what is so tainted by our judgmental thoughts. Therefore, our mind, heart, and will are closed off to different approaches, possible solutions, new ideas, or revelations. There is always something to be learned in any given experience, if we approach the experience with an open mind, heart, and will.”*

Shohreh R Aftahi, PhD  
From the book “What are you Willing to Give up for Happiness”

# Communication for Results

2. When you identify the challenging areas, then you can formulate a plan to overcome those challenges.

A. If being an effective listener is a challenge, what do you think is causing it?

---

---

B. What can you do to become an effective listener?

---

---

3. How can you reduce the 'noise' when working with your team?

---

---

**NOTES:**



# Communication for Results

Paraphrasing or summarizing is an important skill. Write a dialog you can regularly use with your team exhibiting this skill. (use the notes section below if you need more space)

---

---

---

---

4. Having thought about your communication skills in this section, what action are you going to commit to take immediately?

---

---

---

---

**NOTES:**

# Strategy and Positioning

Successful sales professionals possess a multitude of skills and knowledge. They have significant knowledge regarding relevant companies, products and services, competition and marketplace. One of the responsibilities of a sales manager is to assist their teams to acquire the appropriate level of knowledge and skills.

- 1. Below are 3 crucial areas, rate your team in each area using a scale of 1 to 10. 10 being the highest. Use the drop down menu if completing the assessment on the computer; otherwise, circle the appropriate option.**

## The Company

History	1	2	3	4	5	6	7	8	9	10
Products & Services	1	2	3	4	5	6	7	8	9	10
Organizational structure	1	2	3	4	5	6	7	8	9	10
Future plan	1	2	3	4	5	6	7	8	9	10
Mission	1	2	3	4	5	6	7	8	9	10

## Competition

Who is competition?	1	2	3	4	5	6	7	8	9	10
Why do customer buy?	1	2	3	4	5	6	7	8	9	10
What are their strengths?	1	2	3	4	5	6	7	8	9	10
What are their weaknesses?	1	2	3	4	5	6	7	8	9	10
How to sell against?	1	2	3	4	5	6	7	8	9	10

## Marketplace

Who is best customer?	1	2	3	4	5	6	7	8	9	10
Where is best customer?	1	2	3	4	5	6	7	8	9	10
How do they buy?	1	2	3	4	5	6	7	8	9	10
Why do they buy?	1	2	3	4	5	6	7	8	9	10
What benefits do they desire?	1	2	3	4	5	6	7	8	9	10

# Strategy and Positioning

2. Based on the assessment you just completed, what action will you take immediately?

---

---

---

---

**NOTES:**

# Sales Training

The level of effort that a sales manager invests in increasing the skills and knowledge of their team to perform with excellence is one of the most important factors in achieving the success. Keep in mind that the sales team is one of the key sources of competitive advantage for the organization.

**1. What are the critical success factors in your sales environment?**

---

---

---

---

---

**2. How do you share the critical success factors you identified above with your team?**

---

---

---

---

---

**NOTES:**

# Sales Training

3. Based on the information in this section, what action will you take immediately?

---

---

---

---

**NOTES:**

# Motivating Others

Motivating others, and keeping them motivated is a difficult task. It is important to identify what is *intrinsic vs extrinsic*. The most powerful motivation is when it's intrinsic. A sales manager must foster a culture of positive learning, respect and care in order to create an environment that promotes intrinsic motivation.

1. List five things you can do to keep your team motivated and positive.

---

---

---

---

---

2. What is is being currently recognized in your organization?

---

---

---

3. What do you recognize, behavior or achievement?

---

---

---

---

---

# Motivating Others

4. What action will you take immediately based on what you've learned in this section?

---

---

---

---

**NOTES:**

# Coaching

Coaching is the foundation of an environment of positive learning, personal accountability, and ownership. It is imperative for a sales manager to know in which area he or she needs to coach their team and team members.

- 1. Identify the steps in your selling process, and include key skills required for each step in the table below**

Steps in Sales Process	Key Skills Required
1. _____	_____ _____
2. _____	_____ _____
3. _____	_____ _____
4. _____	_____ _____
5. _____	_____ _____



# Coaching

1. For each team member identify three areas that need coaching, then prioritize them  
a, b, c

**Salesperson**

---

**Coaching Needed**

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

**Salesperson**

---

**Coaching Needed**

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

**Salesperson**

---

**Coaching Needed**

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

# Coaching

3. Describe a couple of performance gaps you have witnessed in the field.

A. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Write down what action are you committed to taking immediately based on the information in this section.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# Time Management Skills

*“If it’s your job to eat a frog, it’s best to do it first thing in the morning. And if it’s your job to eat to frogs, it’s best to eat the biggest one first.” — Mark Twain*

Time is your most precious resource. Prioritize and put your focus on the most important tasks.

**1. Name one or more measurable tasks that is a responsibility of a sales manager?**

---

---

---

**2. What is the task that only you as the sales manager can accomplish?**

---

---

---

**3. Where should you as a sales manager spend 50% to 80% of your time?**

---

---

---

# Time Management Skills

**4. List the leverage points in your job as a sales manager?**

---

---

---

**5. Indicate below the trivial tasks that consume a lot of your time.**

---

---

---

**6. Indicate below what you can do to reduce or eliminate the time spent on trivial tasks identified above.**

---

---

**7. Can you delegate any of the tasks you mentioned above?**

---

---

# Time Management Skills

8. What action are you going to take immediately to improve your time management?

---

---

---

*“Once you’ve identified your goals, and prioritized your daily tasks, it’s time to examine how you are currently spending your time. Are you working on the things that matter most, the things that will allow you to reach those goals, or are you getting bogged down by unrelated tasks or startling crises?”*

Shohreh R Aftahi, PhD

**NOTES:**

# Leading the Action

Your teams will move mountains for you if you are their leader, however management is **not** leadership. In order to be a leader for your people, you must touch their mind and their heart.

**1. What do you do to make your team feel better about themselves?**

---

---

---

**2. What calculated risks do you take?**

---

---

---

**3. Are you complaining? What about? How will you stop? Do you take responsibility?**

---

---

---

---

# Leading the Action

- 4. Consider yourself to be a “precious resource”. Where are you wasting your efforts? What are you going to do to stop wasting your efforts?**

---

---

---

- 5. Where should you demonstrate flexibility?**

---

---

---

- 6. What information don't you have that you need to gather from your team? What skills do you need to acquire?**

---

---

---

---

# Leading the Action

7. Indicate below what action you will commit to taking immediately based on the conversation in this section.

---

---

---

**NOTES:**





# ACTION PLAN

DATE: \_\_\_\_\_

	ACTION	COMPLETION DATE
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		



## Goal Setting

**“Whatever the mind can conceive  
and believe it can achieve”**

Napoleon Hill