Sandler Training
Finding Power In Reinforcement℠

Strategic Sales Management℠

Professional Development System

Is your sales management system a series of putting out fires?
Hoping your salespeople will get their act together?
Fighting to hit your monthly numbers?
Are you working on the right end of the problem?

We work with sales managers who struggle with issues like …

- Finding and keeping the best salespeople
- Maximizing the personal performance of every team member
- Strategies for pre-call planning and debriefing
- Running productive and motivational sales meetings

The Sandler Sales Institute offers the Strategic Sales Management Program that Entrepreneur Magazine calls 'the best sales management program in North America.' When adapted to your world, this system becomes a powerful force for accountability, the setting and achievement of goals and a whole new way of approaching the 'toughest job in the building'.

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THROUGHOUT NORTH AMERICA AND AROUND THE WORLD
HALIFAX — MONCTON — OTTAWA — TORONTO — MILTON — KITCHENER/WATERLOO
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Recruiting
The first step to successful recruiting is specifically defining the position to be filled, taking into consideration the various dimensions of interaction of the new hire.

During the session participants will develop a job profile—a functional description of a position to be filled. Then, they will develop a Hiring Template consisting of the primary function identifiers (PFIs), attributes of winners, and team matrix considerations, all of which describe the ideal candidate.

Finally, they will learn how to use the Hiring Template to screen candidates for the formal interview process, and ultimately make a best-fit selection.

Hiring: Interviewing
Interviewing is a critical step in the hiring process. In this session, participants learn how to use the Hiring Template elements to narrow the applicant field and ultimately select the best-fit candidate. They will explore the preparation for a systematic five-step process of interviewing.

Participants will examine the elements of communication and their influence on the interview process. They will also explore various questioning strategies for developing appropriate interview questions and conducting the interview in such a manner as to reveal the "real" applicant. Some of the EEOC requirements regarding interviewing and hiring will be discussed.

The use of inventory and assessment tools as valuable additions in developing a picture of the candidate in order to determine how well he matches the ideal candidate profile defined by the Hiring Template will also be discussed.

Participants will examine the Data Collection Matrix as a tool to both identify from which source they are likely to obtain necessary information and also help organize that information and indicate the completeness of the interview process.

Hiring: Assessment and Decision Making
Hiring represents a tremendous investment of company resources in one individual over a long period of time. Not only is the hiring process itself an expense, so is training, supervising, mentoring, and so may be the costs associated with the person's performance. It is rare that managers are in a position to have a greater opportunity to maximize company resources than during the hiring process.

Assessment of fit and a preliminary ranking of candidates are not activities best left to intuition or hunches. Our hunches too often are that we like people who are like us. Relying on your gut instincts can compound your strengths and your weaknesses. The SEARCH process and the development of a Hiring Template (PFIs, winner attributes, and team matrix) work together to enhance your judgment in determining the best fit candidate from your candidate pool. Now you are ready to decide whom to hire.

Participants will engage in an exercise to put together all of the previously presented pieces of the hiring puzzle and select a candidate from a candidate pool of five, none of whom represent a 100% fit across the board. Using the hiring tools and the information provided, they will use their judgment to determine a best-fit candidate.

Understanding Your People: I/R, TA, and DISC
To effectively manage his people, the manager must not only understand them, but he must also understand the dynamics of interaction with and between them. In this session, participants will examine three concepts that influence these interactions.

Participants will discover how I/R Theory will help them deal effectively with role performance while preserving others' core identities.

Learning about TA will help them to understand others' states of mind and the nature of the interactions between them and others.

Developing an awareness of DISC will give participants a better understanding of employee styles for processing information and emotion. These styles translate into behavioral characteristics that participants can identify and use to strategize management approaches to individual staff members based on their styles.

By better understanding their people, participants are in a more advantageous position to help them grow, which in turn can increase departmental productivity.

Understanding Your People: Communication
The ability to communicate effectively is an essential management tool. During this session participants will learn that effective communication is a multi-step, closed-loop process. Each step has the potential to influence the message being communicated in a manner that may increase or decrease its clarity and ability to be readily understood.

Participants will examine the three components of communication—the words, the tonality with which the words are spoken, and the body language that accompanies the words—each of which contributes in varying degrees to the total message. When all three components are congruent, they unify and strengthen the message. When they are not, they weaken or blur the message which can give rise to misinterpretation and misunderstandings. Participants will have an opportunity to explore their own communication methods and preferences.

Participants will also explore the channels through which messages can be transmitted and the concept of "the medium is the message." They will then determine which channels are most appropriate for certain types of communications and which have the potential to weaken or blur the message.

Finally, participants will explore methods of soliciting and providing feedback as a means of completing the communication process.

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Leadership Roles: Overview
Participants will take a brief look at four critical management roles: supervising—which derives its authority from the manager's hierarchical position in the company; and coaching, training, and mentoring—whose authority evolves from the relationship. They will examine how they invest their time in these functions and draw some conclusions about the distribution of time in those efforts.

Leadership Roles: Supervising
The main function of the manager is to keep the sales team on target toward achieving its goals. To manage for these goals effectively, the manager has to monitor performance by tracking actions and comparing results to predetermined benchmarks to determine if the salesperson is on target.

Participants will identify actions and results to be monitored. Then, using the Structural Analysis of a Sale model, participants will identify benchmarks against which to compare monitored results.

Participants will learn about a six-step, continuous review process for performance improvement. This process will enable participants to identify when salespeople are off track with their goals, where they went off track, determine what it would take to get back on track, and communicate that in a supportive manner.

This continuous review produces two major outcomes. The first is that of maintaining progress on the salesperson's action plan. The second is the identification of persistent patterns of problematic behavior in need of improvement. This in turn will lead to a career development plan that may include recommendations of coaching, training, and/or mentoring.

Leadership Roles: Coaching
Participants will learn the basic purpose of coaching, which is to enhance performance by encouraging the appropriate application of competencies—which in turn increases motivation and demonstrates corporate support. Participants will examine two levels of coaching: tactical coaching—helping the salesperson apply knowledge and skill to selling situations; strategic coaching—helping the salesperson assess situations and conditions, plan a strategy, and act appropriately.

Participants will also learn a three-step process for tactical coaching that includes preparation for and follow up on the face-to-face coaching session. Participants will learn and practice approaches for conducting the coaching session in a non-judgmental and supportive manner.

Executed properly, coaching is a collaborative effort conducted in a positive atmosphere and facilitates incremental and continuous growth.

Leadership Roles: Training
Participants will view training as a process—rather than an event or sequence of independent events—and examine their roles in the process.

Participants will examine three elements necessary for effective performance—ability, motivation, and support—and examine how training supports those elements.

They will also explore the various types of corporate training and discuss the manager's role in identifying training needs, arranging for the delivery of training, and following up after the training. Finally, participants will apply their knowledge to developing a training program.

Leadership Roles: Mentoring
Participants will explore mentoring as a means of facilitating an individual's assimilation to current and/or future positions, while strengthening their sense of group membership and deepening their understanding of their role.

The role of mentor will be discussed and the ingredients for successful mentoring will be identified. The elements the mentee must bring to the process for the relationship to be successful will also be identified. Participants will discover the strong relationship aspect of mentoring and how it can be adapted to enhance a team member's performance across the board.

Understanding Your People: Performance Evaluation
The goal of continuous performance reviews is continuous improvement and development along an acceptable career path. The formal, periodic performance evaluation either confirms that such progress is being made or identifies individuals whose performance is below standard and requires drastic change or termination.

Participants will come to see that performance evaluations are an integral part of the process of continuous performance improvement, and necessary for managing turnover in a productive manner.

Managing Work Relationships: Conflict Management
Participants will discover that conflict can have a positive effect on an organization. It can be used to harness diversity—the natural differences represented among people with different points of view.

Participants will discover that it is natural for conflicts to develop when people with different values, behaviors, and goals work together. However, with a structured process and the use of appropriate communication skills and knowledge of human behavior, managers can mediate the conflicts and facilitate "win-win" solutions that do the least harm and the most good for the most people.

Goal Setting
Participants will examine the link between corporate goals and the individual salesperson's goals and explore ways to make that link a component for maximizing individual performance. Participants will also be introduced to the three categories in which many motivational factors fall: relationship, status, and achievement.

Participants will discover that the manager's first step in creating realistic performance expectations is to determine what motivates sales team members. Then, by channeling team member's efforts in appropriate directions, monitoring performance against established benchmarks, and providing appropriate support, the manager becomes the link that enables the sales team members to fulfill personal goals and aspirations and achieve company goals.

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Managing Organizational Change
Participants will examine the process of change in the business environment and discover that it is inevitable and it is through its employees that companies effect change.

Participants will discover that people resist change and when confronted by it, they experience a range of emotions. They will examine the process by which change takes place—a transition that occurs over time rather than overnight. Participants will become more aware that people need to understand the reasons for and benefits of the change. Participants will see that by helping their employees understand those reasons and benefits, the easier the transition will be and typically, the more quickly it will be completed.

Finally, participants will be introduced to a ten-step process for systematically facilitating and managing change.

Staging Effective Sales Meetings
Participants will examine the various aspects of designing, developing, and conducting effective sales meeting. They will borrow the elements of a sales call "up-front contract" to help structure sales meetings and identify agenda items.

Participants will explore three elements of the sales meeting process—planning the meeting, conducting the meeting and following up after the meeting.

They will also look closely at planning the meeting and exploring various aspects and considerations for developing an appropriate and effective agenda—the central core of the meeting.

They will examine the conducting aspect of the meeting process. They will identify and discuss three elements of which to be mindful: preserving the structure of the meeting; promoting interaction with and among meeting attendees; and keeping the meeting focused on the intended outcomes. From the discussion, they will develop a list of dos and don'ts for meetings.

Participants will also examine the elements and importance of following up after the meeting and the pitfalls of not doing so.

Territory Management
During this session, territory management is presented as the process of collecting and analyzing appropriate data and formulating strategies that direct salespeople's efforts to activities that maximize the company's return on the investment of its resources. Participants will examine a five-step process for territory management.

Categories of data to collect and resources for obtaining the data will be identified. Participants will examine two methods—SWOT and matrix analyses—for evaluating the influence each category has on formulating territory strategies.

Participants will learn how to identify specific territory management strategies and action plan objectives using the information revealed by the analysis.

Participants will use a matrix analysis process for classifying accounts to help determine the allocation of resources to meet territory management objectives.

Facilitating Account Management: Growth Strategies
During this session, participants will look at a method for classifying accounts, and then identify appropriate strategies for maximizing the return on the investment of time and energy calling on and servicing them. They will examine a five-step process for growing accounts by identifying and implementing ways to add value to the relationship, improve the processes of interacting with them, and strengthen relationships with their people.

Collecting and analyzing relevant data is central to the account management process. Using the "Account Plan" and "SWOT Analysis" worksheets, participants will use two systematic methods for organizing and analyzing data from which they will develop appropriate goals and action plans.

Facilitating Account Management:
The Proposal Process
Preparing and presenting proposals is an important part of the sales process. However, they must occur at the right time and be directed at the right audience. Participants will examine their role in overseeing the proposal process, both in terms of deciding when it is appropriate to generate a proposal and when to pass on the opportunity. They will examine a six-step system for responding to proposal requests. They will also examine the criteria for evaluating proposal requests and processes for developing and presenting effective proposals.

Improving Sales Team Performance:
Providing Field Support
Participants will identify the reasons for and benefits of making sales calls with their sales team members. They will examine a five-step process to prepare for, conduct, learn from, and put into action the lessons learned from joint calls. The will also examine two useful tools—a call planning worksheet and an observation checklist—to help them implement the process.

Participants will identify members of their sales teams with whom to make joint calls and the reasons for doing so.

Maximizing Personal Performance:
Time Management and Delegation
Participants will view time as a non-renewable resource that they are free to frame however they choose. They will learn to schedule their activities in a time-oriented matrix. They will learn how to handle time wasters and interruptions, and look at tips, tools, and techniques to organize time effectively.

They will learn how to use delegates as a powerful way of working smarter; allowing them to put their time into the areas of their work that are most critical.

Maximizing Personal Performance:
Scripting Your Adult for Success
Participants will learn that a critical factor in addressing the stress in their lives is to change the negative behavior patterns that automatically come into play when they are under stress and contribute to that stress. They will learn that by identifying the negative behavior patterns and working to change them, they can decrease the impact stress has on their behavior. This, then, prepares them to focus on the work environment of their department.

*Training times are calculated for a small group—six or less. If you are training a larger group, allow more time for the completion of exercises and discussions.