



Sales Manager Survival Guide

**Sales Management
Ecosystem**

For example, very often, we look at Sales Training in isolation. We invest thousands to millions in the best sales training programs money can buy---yet after 3-6 months, we see little performance improvement.

That's because training by itself can't sustain the changes the organization needs. We must integrate the training into our sales programs, processes, systems, and tools. We must continually coach and reinforce the concepts introduced in the training.

Without recognizing how each component impacts the other, we can't drive the changes and performance improvements needed to achieve our goals.

Sales Management Ecosystem

The sales organization is a complex set of strategies, priorities, organizational structures, systems, tools, processes, metrics, programs, and people.

Each component is interrelated, each impacts the other. As we look to improving the performance of the organization, it's easy to get confused by all the "pieces/parts," how they fit together, how they interact.

A change in one component can have devastating impacts on another. Alternatively, focusing exclusively on one element, can adversely impact others.

The Importance Of "Frameworks," and Ecosystems

A Framework or Ecosystem provides a model to help us understand all the pieces/parts involved in building a high performing sale organization.

The ecosystem helps us understand the interrelationship of the various parts or components. We get to see how they fit together and influence each other. We understand what happens if we under invest in certain areas, or what might happen if we totally ignore one element.

The ecosystem provides us an approach to problem solving and driving performance improvement.

Too often, in addressing problems, we tend to address symptoms, rather than understanding root causes.

No sales program in the world will help us produce better results if we are addressing the wrong customers in the wrong markets. No incentive or SpIF program will drive new product sales if the sales people don't understand the target customers, the problems the product addresses, or the value the solution creates for the customer.

If we are looking for continued performance improvement, we have to understand the interrelationships of the various issues that impact performance, identifying root issues and addressing those, rather than issues that are merely symptoms.

Another interesting thing happens when we start looking at the hierarchy of issues that impact performance improvement. When we attack and solve a root issue or problem, many of the problems that were symptoms of the deeper issue simply go away.

For example, most pipeline integrity problems disappear, if you have a strong sales process that people are executing on every single deal. Likewise, win rates improve, sales cycles decrease, and deal margins increase.

By focusing on a strong sales process that people use, we reduce many of those other problems. If, however, we focused strictly on reducing sales cycle, without the underlying sales process, it's difficult, if not impossible to solve the problem.

Ecosystems or frameworks help us understand the natural hierarchy of components, issues, and challenges that impact the overall performance of the sales organization.

They provide a structure to assessing the organization, identifying opportunities to improve, driving change, and assuring you are maximizing the capability and capacity of the whole organization.

Sales Management Ecosystem:

The ecosystem or framework below, is a tool we have found useful in helping our clients assess their sales functions and organizations.

In some cases, there's a need to look at the whole function. For example if you are in a start-up and are building a road map for establishing and growing the organization.

Or if the organization is troubled or needs a turnaround or transformation, looking at the entire framework as a whole, identifying the priorities, and establishing the corrective action plan.

Sometimes, you only need to look at a small part of the framework, focusing on specific areas. But you want to do it in a context to make sure how any changes you may be driving might ripple through and impact other aspects of the sales function or organization.



The ecosystem outlined here, has 5 interrelated components or pillars:

- Leadership
- Strategy
- Business Management
- Coaching
- People

While each impacts the other, the general hierarchy we are trying to portray in this ecosystem is the following:

- Leadership drives the overall functional strategy.
- Functional strategies drive the day to day business management focus and activities.
- Business management drives coaching requirements.
- People and talent are critical and common to each pillar

One could argue a different picture, but what we are trying to do is build a rough model of the major components of the Sales Management Ecosystem.

Connecting The Dots:

Some of you may be wondering about much of the content in the *Sales Manager Survival Guide* and it's connection to the Sales Management Ecosystem.

As you read through this, you will see lots of overlaps with the materials in the book. Early sections of the book focused on coaching, people, and performance management issues. Later sections focused on strategy, business management (sales enablement, sales operations). We addressed some of the leadership principles both very early in the book and in the concluding chapters.

Without knowing it, after reading the book, you are already starting the think in terms of a framework and the ecosystem.

After you've read these materials, you might review parts of the book to understand how these different elements fit

together and impact each other, and what it means as you set your agenda as a leader and manager within your organization.

Leadership:

We believe the right leadership framework underpins everything else in the organization.



In leadership, we aren't speaking so much of the specific leaders themselves, but we are focused on leadership principles. Like:

- Organizational culture
- Value system and beliefs
- "Who we are, what we stand for"
- "How we hold the customer," Customer focus, Customer centricity
- Mission/purpose
- The role of the organization in the enterprise. Establishing a sales climate.
- The role of the leader/manager
- Leadership maturity and development models
- Establishing a "coaching culture"
- Continuous improvement, learning, agility

An organization that does not have a strong culture and value system, customer focus, mission or purpose will never be able to perform at the top levels. These act as the glue that attracts

people to the organization, it binds them together in a cohesive team.

In very difficult times, it is these core issues that provide a framework for mobilizing the organization to change.

The sales organization does not stand alone. The culture, values, customer focus, mission, purpose are derived from that of the enterprise.

Having said that, there are some nuances that may be different for the sales organization in how they leverage these critical core elements in engaging customers.

Strategy:



Driven by the leadership principles, the sales executives develop the overall functional strategies and priorities of the organization.

Components of this include:

- Overall enterprise business strategies, goals, and priorities
- Alignment of the sales strategies with enterprise strategies
- Customer experience frameworks/strategies, lifetime customer management
- Target markets/segments
- Market ecosystems
- Market analytics, trends, issues, dynamics

- Go to customer, sales deployment strategies. Organizational structures/models
- Value creation models
- Customer maturity model
- Industry/segment maturity model
- Propensity for market/industry disruption
- Competitive positioning/differentiation
- Sales effectiveness/productivity principles
- Sales competency principles
- Roles/responsibilities within the organization
- Inter/intra sales organizational alignment
- Globalization
- Key metrics
- Continuous learning, continuous improvement, knowledge management
- Agility in the sales function

In these areas we are focused primarily with how we show up in the markets and how we engage our customers to win.

For example, our overall sales deployment strategies are driven by the business strategies, target markets, market ecosystem, our value creation models, and other things. If we try to develop our sales deployment strategy in the absence of understanding all these other elements, we will fail.

Likewise, if our overall business strategies and market ecosystems shift or change, it has an impact on our go to market and sales deployment strategies.

Business Management:

Business management is where we tend to live our lives. This encompasses the things we do every day.



Everything we do in business management is driven by our strategies and leadership models. The moment what we do on a day to day basis is not in alignment with our overall strategies, we are on the path to fail to achieve our objectives.

Let's look at a simple example: Imagine your company wants to expand it's markets, addressing new segments. It launches new products, creates new marketing programs focused on bringing solutions to those markets.

But from a business management point of view, while we may provide training and sales programs to support this new strategy, we don't develop the sales processes, we don't change the metrics or performance expectations for the sales teams, we won't achieve the goals for the company.

While we may still be making our numbers, overall, we aren't executing the strategy of the organization. Over time this is a recipe for failure.

In the real world, we see this happening, perhaps unconsciously, every day. Sales people sell the products they know, understand and have achieved success. They call on customers they know, understand, and have some level of relationships.

Unless our day to day execution of our business management strategies are aligned with the overall strategies of the organization, ultimately, we fail to achieve our goals.

As we drill into the business management components, there are a huge number of things we have to consider, including:

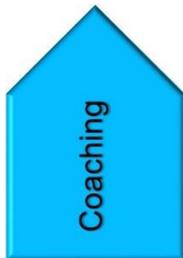
- Sales enablement:
 - Training: Product, market, sales skills, business acumen, change, problem solving, collaboration, etc.
 - Integration into systems, processes, tools.
 - Reinforcement strategies.
 - Sales methodology
 - Content: Playbooks, collateral, case studies, data sheets, etc.
 - Sales tools: CRM, Marketing Automation, proposal management, productivity
 - Sales and marketing programs
 - Onboarding
- Sales process:
 - Customer buying process, customer engagement model
- Coverage models:
 - Territory coverage/alignment
 - Account coverage/alignment
 - Partner/channel coverage
 - Headcount/affordability models
 - Inside sales
 - BDR/SDR
 - Specialists
- Sales support
- Resource alignment, job definitions, roles/responsibilities
 - Organizational structure
 - RACI modeling
- Competency models
 - Model for each role in the sales organization
 - Development models
- Sales operations:
 - Quota planning/analysis
 - Metrics
 - Forecasting
 - Sales performance analytics, sales effectiveness analytics
 - Activity management/analytics
 - Budget/expense management
 - Headcount planning and analysis
 - Price/margin management, Deal desk
 - RFP/RFQ management
 - Contract management/legal
 - Sales order management and processing
 - Win/loss analysis
 - Competitive analysis/competitive intelligence
 - Workflow management/analysis
 - Compensation/incentive management
 - Performance planning, management, review process
- Sales programs
 - Demand generation/lead gen
 - Lead management
 - Sales/marketing integration
 - Tradeshow

- Webinar/seminar
- Prospecting programs
- Workflow management
 - Sales order management
 - Proposal management
 - Lead management
 - Onboarding
 - Performance management
 - Deal desk/pricing
 - Legal
 - Customer onboarding, customer experience
 - Sales/marketing integration
 - Sales/customer service integration
- Systems/tools:
 - CRM and sales automation tools
 - Marketing automation tools
 - Content management tools
 - Proposal/configuration management/pricing
 - Learning/knowledge management
 - Value management/business justification tools
 - Analytics—customer, sales performance
 - Mobile support
 - Mobile support
 - Computer support
 - Channel/partner portal
 - Systems training
 - Stack management/performance/budget management
- Problem management
 - Customer experience, customer support
 - Problem resolution process
 - Problem escalation process
- Customer satisfaction, Net promoter analysis
- Problem performance/performers—measured mile.
- Channel/Partner Management
 - Channel management organization, structure, roles/responsibilities
 - Channel deployment models
 - Recruiting, onboarding, joint business planning, training
 - Performance management, metrics
 - “Quota” management
 - Channel administration/reporting
 - Performance management
 - Deal registration
 - Order management
 - MDF/SpIF
 - Forecasting
 - CRM integration
 - Order management
 - Channel programs
 - Channel marketing
 - Demand gen/lead management
 - Training/certification
 - Portal
 - Conflict/problem management
- Metrics
 - KPIs, overall organizational goals/metrics
 - Business management (quota, growth, margin, share, customer satisfaction)
 - Strategic initiatives (customer acquisition, retention, product line performance, market

- segment performance, balanced performance objectives)
 - Activity metrics (pipeline, prospecting, calls, meeting, proposals)
 - Personal development
 - Customer experience
 - Quality, learning management
- Team management
 - Sales meetings
 - Incentives
- Sales administration and reporting
 - Review process
 - QBRs
 - Forecasting
 - Performance management

Clearly, you've seen some redundancy in the business management issues. Undoubtedly, there are things in your business that aren't included. These should be adjusted to reflect your reality.

Coaching:



Coaching needs to be integrated into every aspect of what we do every day. But our coaching has to be focused, driven by our leadership principles, strategies, and tuned to our day to day tactical business management.

Coaching is the single highest leverage activity a sales manager can undertake.

As you have learned from reading Sales Manager Survival Guide, we increase our impact and effectiveness by integrating coaching into our day to day business management activities. Consequently, many of the coaching activities seem to mirror our business management priorities.

Components we have to consider in looking at developing a coaching culture (driven by our leadership principles) include:

- Coaching/mentoring principles
- Coaching the sales process
- Coaching deal strategies
- Coaching the pipeline/funnel
- Coaching sales calls
- Coaching account/territory planning
- Coaching partner/channel management
- Coaching prospecting
- Coaching time and activity management
- Reinforcement coaching for training, systems, processes, tools
- Conducting effective one on one's.
- Coaching/onboarding new employees
- Coaching problem performers
- Integrating coaching into team meetings
- Coaching and performance management
- Coaching and personal development, development planning
- Leveraging communications styles and effectiveness
- Giving and receiving feed back
- Dealing with the "uncoachable"
- Are you coachable?

People:

Having the right people and talent is critical to each of these areas and subcomponents. That's why people overlay the other elements of the Sales Management Ecosystem.



In some senses, you might think of this as a “chicken and egg” process. Without the right talent, you can't develop the leadership principles, strategies, business management priorities, and coaching approaches. But understanding these, drive the type of

people and talent you need.

Where ever you start your process of developing the Sales Management Ecosystem for your company, the issue of people and talent will constantly impact what you are doing—you'll end up iterating back and forth in your work efforts.

Some of the critical components of the people element include:

- Overall organizational model (structure, jobs, staffing requirement/models, roles/responsibilities.)
- Culture/value system fit.
- Expected attitudes, behaviors, conditions of employment
- Recruiting, interviewing, hiring, assessments
- Onboarding

- Performance planning and management
- Career planning and professional development
- Leadership development
- Attrition/retention
- Employee satisfaction
- Employee communication and engagement
- Morale
- Problem performers
- Compensation principles/competitiveness

What Does This Mean, Putting It Together:

You are probably wondering, “What's all this mean, what do I do with this?”

It's rare that you look at the ecosystem in its entirety. Sometimes, as the top sales executive, you start assessing the whole model, but inevitably, even top executives dive into specific issues and components.

Usually, you will be focused on a specific issue. It may be something new you want to put in place, for example a new sales tool. It may be changes you want to drive, for example moving from a field direct model to a hybrid model of BDRs, inside sales, field sales people. It may be problems you are facing in the organization and how you address them.

In reality, you will probably be focused on a specific issue.

If anything, hopefully this model shows you how “interrelated” each of the elements are. Making a change in one area is seldom isolated, but may impact many other areas.

For example, changing the sales process, impacts the systems, tools, programs, training, and potentially metrics.

Successfully implementing a change requires us to be attentive in our coaching and communication.

As you consider changes at any level of the model, be aware these changes can ripple through and impact other elements. Take a few moments to think about these, making sure you address them in your change initiatives and implementation.

Sometimes, you will encounter systemic day to day business management challenges and issues. You may see win rates declining, increasing demand for discounting, difficulty in competing, difficulty in prospecting and qualifying new opportunities.

As you start seeing a number of disparate operational challenges, usually, these are symptoms of more fundamental issues impacting the performance of the organization.

Solving anyone of these, or each of these, on its own is unlikely to be a sustainable fix, at best it’s like putting a band-aid on a problem.

As you see these, it’s important to look at the core issues to see the patterns you are seeing are deeper. For example, lots of issues you may be dealing with on a day to day basis

(business management/operations) may actually indicate problems with your overall functional/business strategies or leadership principles.

What used to work but is no longer working is often driven by fundamental shifts in the business and markets. We don’t solve these at a business management or coaching level, we solve them at the strategic and leadership level.

As you look to make changes, drive improvement, address problems or new opportunities, realize nothing you do exists in isolation. Leverage this framework or ecosystem to think about what you are trying to achieve. Leverage it to make sure you’ve accounted for all the pieces/parts of making things happen in your organization.

Adapting This For Your Organization:

Every organization is different. Many of the items or components we’ve discussed are not relevant to your company and what you are trying to achieve with your organization.

Undoubtedly, there are some things that haven’t been included that are critical to your organization.

Take this model as a starting point and adapt it to your own organization.

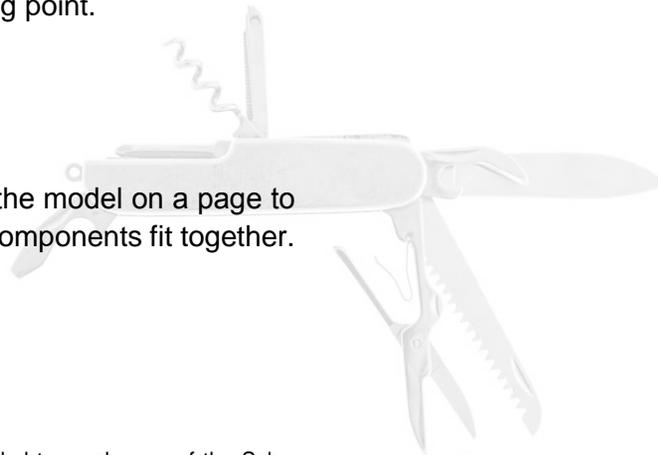
We do think the core elements are pretty universal as a starting point:

- Leadership
- Strategy
- Business Management
- Coaching
- People

The subcomponents for each of these will vary slightly, but the model presented here is a good starting point.

Wrap-up:

In the following page, we've captured the model on a page to make it easier for you to see how the components fit together.



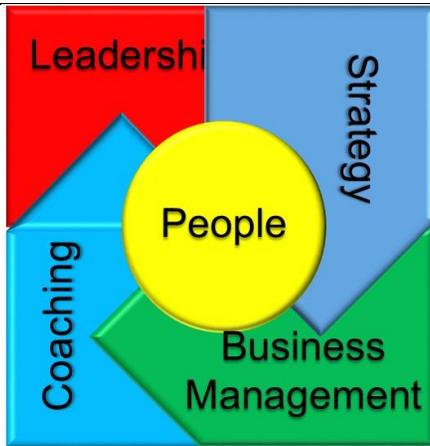
About Sales Manager Survival Guide:

These materials are supplementary materials provided to purchasers of the Sales Manager Survival Guide. For more information and resources, visit salesmanagersurvivalguide.com

About Dave Brock:

Dave is the author of Sales Manager Survival Guide and is CEO of Partners In EXCELLENCE, a global business strategy, sales, marketing, and customer experience consulting company.

For more information about these resources, how to implement them in your company, or to get Dave to speak, coach, or consult, contact Dave at dabrock@excellenc.com. More resources are available at: partnersinexcellenceblog.com and excellenc.com



Sales Management Ecosystem

<u>Leadership Principles</u>	<u>Functional/Business Strategy</u>	<u>Business Management</u>	<u>Coaching</u>	<u>People</u>
<ul style="list-style-type: none"> Organizational culture Value system and beliefs “Who we are, what we stand for” “How we hold the customer,” Customer focus, Customer centricity Mission/purpose The role of the organization in the enterprise. Establishing a sales climate. The role of the leader/manager Leadership maturity and development models Establishing a “coaching culture” Continuous improvement, learning, agility 	<ul style="list-style-type: none"> Overall enterprise business strategies, goals, and priorities Alignment of the sales strategies with enterprise strategies Customer experience frameworks/strategies, lifetime customer management Target markets/segments Market ecosystems Market analytics, trends, issues, dynamics Go to customer, sales deployment strategies. Organizational structures/models Value creation models Customer maturity model Industry/segment maturity model Propensity for market/industry disruption 	<ul style="list-style-type: none"> Sales enablement: Training: Product, market, sales skills, business acumen, change, problem solving, collaboration, etc. (Integration into systems, processes, tools.; Reinforcement strategies.) Sales methodology Content: Playbooks, collateral, case studies, data sheets, etc. Sales tools: CRM, Marketing Automation, proposal management, productivity Sales and marketing programs Onboarding Sales process: Customer buying process, customer engagement model Coverage models: Territory coverage/alignment Account coverage/alignment Partner/channel coverage Headcount/affordability models Inside sales BDR/SDR Specialists 	<ul style="list-style-type: none"> Coaching/mentoring principles Coaching the sales process Coaching deal strategies Coaching the pipeline/funnel Coaching sales calls Coaching account/territory planning Coaching partner/channel management Coaching prospecting Coaching time and activity management Reinforcement coaching for training, systems, processes, tools Conducting effective one on one’s. 	<ul style="list-style-type: none"> Overall organizational model (structure, jobs, staffing requirement/models, roles/responsibilities.) Culture/value system fit. Expected attitudes, behaviors, conditions of employment Recruiting, interviewing, hiring, assessments Onboarding Performance planning and management Career planning and professional development Leadership development Attrition/retention Employee satisfaction Employee communication and engagement Morale Problem performers Compensation principles/competitiveness

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