



# ***THE TEN STEP GUIDE TO SUPERCHARGE YOUR SALES DEPARTMENT***



***The 10 things every sales department needs  
to be successful!***

James Kernan of Kernan Consulting has developed this guide as a checklist based on industry best practices and success stories around the country. They have worked with hundreds of high-performance sales teams and below is what the best of the best are doing.

## **10 Key Areas of the Sales Department**

1. **The Sales Plan** It is difficult to be successful in sales and marketing if you don't have a plan with goals. Like a business plan, all business development teams should have a Sales Plan. The number one reason holding companies back from smooth selling is the lack of a sales plan understood by all. Your sales approach needs to be defined as part of the Sales Plan. Always consider delivering proposals in person so you can review (the big ones) face to face. Don't forget to align your sales and marketing plans for continued growth. **Make sure it is understood by the entire sales team!**
2. **Create Goals/KPI's – Your Sales metrics need to be clearly defined.** Attention must be paid to how a company is keeping score of sales activities and results. **Measure:** activity goals: #Phone calls, #Meetings, Quotes/Pipeline, MRR, Sales, Revenue, Gross Margin Revenue. Use your tools to make tracking your goals easy! We recommend sharing them internally with the team, so all their peers can view. Create monthly goals and KPI's so you can educate the team what you expect of them. Then monitor their activity through our tools and weekly meetings. A very important piece to motivate performance around goals and KPI's is a comp plan rewarding them for this. Also, you need to integrate/automate the tools making it easy not only for you to monitor the goals, but also your employees. You can also create dashboards to watch real time.
3. **The USP (Unique Sales Proposition) - Does your sales message differentiate your company from the competition.** The company's sales message must distinguish the company from the competition by communicating unique value. This needs to be updated as part of the plan. You need to build trust with potential customers to win and retain their business. **Create then share with the team.**
4. **Compensation Plans.** What gets rewarded gets done. The company is creating a competitive comp plan to attract and retain professional sales people. The salary plus commissions and are consistent to what you would see in our industry with a higher one-time payout along with a 1% retention (if over quota) for Recurring MSP Contracts.

5. **Marketing Leads.** Having sales reps fend for themselves when it comes to finding leads is an ineffective approach. Marketing must be able to feed enough MQL's (Marketing qualified leads) to the sales team to prospect. Once they become qualified by sales they become a SQL (Sales Qualified Lead). We recommend having a written marketing plan including goals, campaigns and other lead gen activities that can attract market development funds from your key vendor partners.
6. **Sales Skills Training.** You need to have a sales training, mentoring and product training program in place. When employees are trained and highly skilled, they will make you more money! Lastly be sure to have a formal onboarding program for new employees. Everyone should be onboarded and trained properly. You can't hold people accountable to goals, if you fail to train them. This will dramatically help the culture, productivity and longevity of new people.
7. **Communication Structure: Regularly scheduled sales meetings for the group.** Hold weekly meetings for sales. We recommend either on Monday morning or Friday morning. Never make them longer than 45-60min max! These meetings should be a learning experience designed to share success stories, what's working and what's not working, as well as to identify and resolve issues that are getting in the way of making sales. Once you implement those meetings, make sure all your sales team members can truly analyze sales data to understand challenges and opportunities ahead.

**Quarterly performance reviews/feedback.** Performance reviews forces a manager to sit down and evaluate performance. For sales people reviews rarely mean they get a raise, it simply is a formal sit down to explain to them how they can make more commissions!

8. **The Right Software Tools – CRM/PSA and Quoting software.** You need to have a software program that tracks all your contacts and activities for your entire team. Things like email messages in and out, meetings, phone calls all should be journals under the contact record. This is critical when working as a team, so everyone knows the latest with each contact. You also need a Sales pipeline and forecasting tool for tracking and predicting your sales. Having a strong tool in place will help you not only shorten the sales-cycle but will win you more business. Either as a feature of the PSA or another program integrated into the PSA should be your quoting software.

This is very important and should be reviewed/updated weekly by management and each of the sales team members. Key part of the weekly sales meetings. No quote

should be past due and always should show last step and next step. Be sure the probability to close is realistic and that you focus on the top opportunities.

9. **Sales/Marketing Staffing Requirements.** Most sales teams consist of 4 different people based on the size of the organization and team. 1) Outside Sales Person or what I call the “Hunter”; 2) Inside Sales Person aka “Farmer”; 3) Sales Manager – normally needed when you have more than 5 sales people to manage and 4) Pre-Sales Engineer. This person normally goes with the outside sales person on larger service related opportunities and will help design the solution for the sales person and customer. They normally are also required to create the “SOW” Statement of Work aka work plan along with estimating hours needed to complete the project. You don’t want a non-technical person guessing at hours on a complex project!
  
10. **Documented Sales Process.** Be sure to document your sales process. It is challenging to train and manage sales people unless the process is written down. Creating this would help everyone to understand and follow the sales process. Doing this will also increase efficiencies and increase sales!

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