SALES MANAGEMENT PLANNING

Sales Management Checklists to Transform the Way You Work

by Rebecca Twomey

criteriaforsuccess

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Design by Rebecca Twomey

INTRODUCTION

"SUCCESS IS NOTHING MORE THAN A FEW SIMPLE DISCIPLINES, PRACTICED EVERY DAY."

JIM ROHN

If you're a sales manager, chances are improving sales performance is right there at the top of the checklist.

We all want to do well, right? And certainly most of us are looking to progress and succeed, both professionally and personally.

Unfortunately, it seems that roadblocks are inevitable. There always seems to be something getting in the way:

- There doesn't seem to be enough time in the day.
- There are too many tasks on our plate.
- There are other people preventing us from moving forward (management approval, scheduling conflicts, etc.).
- Our overall success is dependent on the overall team, and the overall team seems to be struggling.

If you are currently struggling with one or all of the above, this resource is here to help you.

At CFS we believe that the best way to improve sales performance is to focus on sales management, and that time management and checklists are the key to getting it all done. By organizing our lives and understanding why we do what we do, we'll discover success in a whole new way.

WHAT IS SALES MANAGEMENT?

While this term is often paired with the role of a “sales manager,” it actually refers to something more. In the words of Charles Bernard, sales management relates to an activity, not a person.

In fact, sales management is typically most relevant to salespeople, though it does apply to both managers and salespeople.

For salespeople, it’s important that they manage how they plan and prepare before the sales manager does.

You see, poor sales management simply is a result of poor planning.

So, if you’re looking to improve sales performance, why not start by focusing on sales management?

SALES MANAGEMENT = SALES SUCCESS

A strong sales management plan helps both salespeople and sales managers succeed.

Whether you are a salesperson or a sales manager, this resource will help you improve your sales performance by supplying the necessary checklists to list and track goals and activities.

KEY TAKEAWAY

Sales management is focusing on the activities and disciplines that help both salespeople and sales managers succeed.

SALES MANAGEMENT CHECKLISTS

"GIVE ME SIX HOURS TO CHOP DOWN A TREE AND I WILL SPEND THE FIRST FOUR SHARPENING THE AXE."

ABRAHAM LINCOLN

SELL MORE BY IMPROVING YOUR CURRENT SYSTEM

Your sales success is only as good as the sales process you have in place. If you or your sales team is struggling, we recommend taking a step back and looking at the current system in place.

QUESTIONS FOR SALESPEOPLE

- Are you struggling to get everything done each day?
- Are you finding it difficult to convert prospects to customers?
- Do you find yourself wondering what other team members might be doing that works?

QUESTIONS FOR SALES MANAGERS

- Is your team struggling to get tasks done each day? Are you?
- Is your team finding it difficult to convert prospects into customers?
- Is your team failing to leverage one another for success stories on what works?

ANSWER FOR SALESPEOPLE & SALES MANAGERS

The answer to the questions on the previous page: checklists!

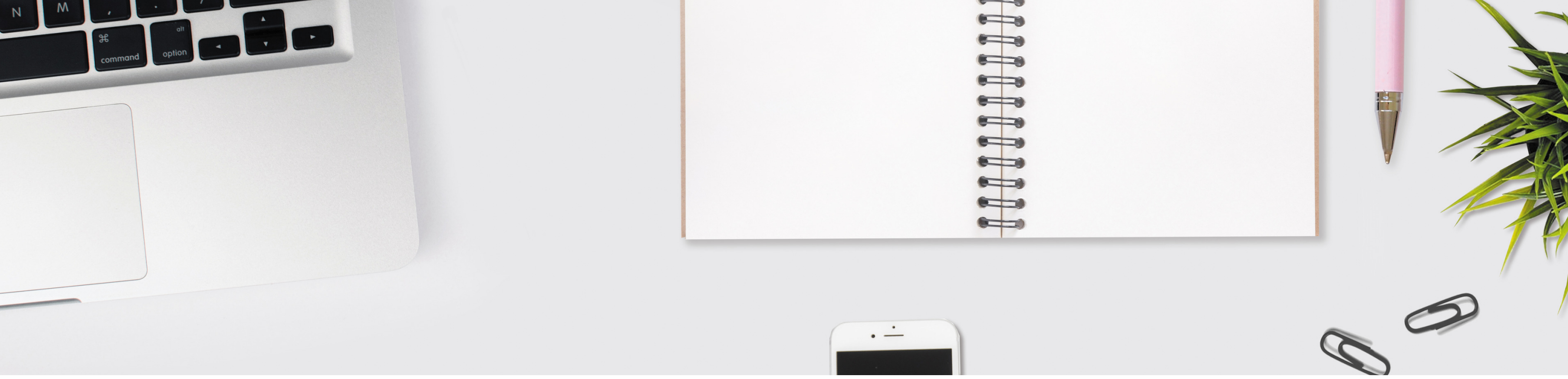
The best way to move beyond problems for both salespeople and sales managers is to follow a system that works.

At CFS, we highly recommend the use of a Sales PlayBook. Not only is it a place to house success stories, best practices, and 30-second commercials—but it is also a place for all team members to stay accountable and track goals.

Don't have a Sales PlayBook? No problem. The checklists below will help as you manage sales activities and goals.

DON'T HAVE A SALES PLAYBOOK?

CLICK HERE TO GET ONE!



SALES MANAGEMENT CHECKLIST FOR SALESPEOPLE

Below is a checklist for what should be managed by salespeople and reinforced by the sales manager (if applicable) for good selling. This comes straight out of our Sales PlayBook:

DAILY/AS-NEEDED CHECKLIST

- [ ] Complete tasks and calendar appointments.
- [ ] Adhere to the Prospecting Action Plan.
- [ ] Work opportunities and update their status in the CRM system.
- [ ] Log activities in the CRM system.
- [ ] Review recent changes in the PlayBook.
- [ ] Review tomorrow's tasks and appointments.
- [ ] Develop agendas for all sales calls.
- [ ] Develop and send D.E.A.L. documents after each sales call.
- [ ] Post success stories when appropriate.
- [ ] Update best practices areas in the PlayBook (Problem/Opportunity Matrix, Common Objections & Pushbacks, etc.) when appropriate.

WEEKLY CHECKLIST

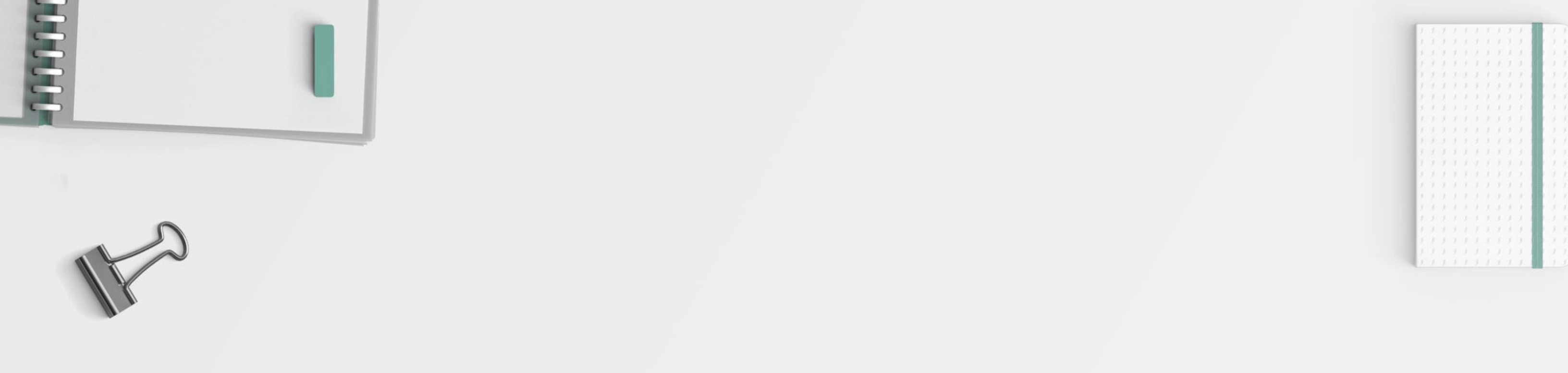
- [ ] Participate in the weekly sales team meeting.
- [ ] Prepare for planned discussions, when appropriate.
- [ ] Set weekly goals and track accomplishments.
- [ ] Review all opportunities and update the status, if necessary.
- [ ] Meet with your manager to review your goals and opportunities.
- [ ] Take notes, if assigned, and post them on the team meeting page in the Sales PlayBook.

MONTHLY CHECKLIST

- [ ] Develop a monthly Prospecting Action Plan.
- [ ] Review your Prospecting Action Plan with your manager.
- [ ] Review monthly reports provided by your manager.

NEED A PROSPECTING ACTION PLAN TEMPLATE?

CLICK HERE!



QUARTERLY CHECKLIST

- [ ] Review all accounts and reset their Client Evolution (Suspect, Prospect, Customer, Client, Advocate, Partner) status, when appropriate.
- [ ] Develop a quarterly Territory Plan.
- [ ] Review quarterly reports (including key performance indicators) provided by your manager.

FORECASTING

WORKSHEET TEMPLATE

CLICK TO DOWNLOAD

CLIENT EVOLUTION

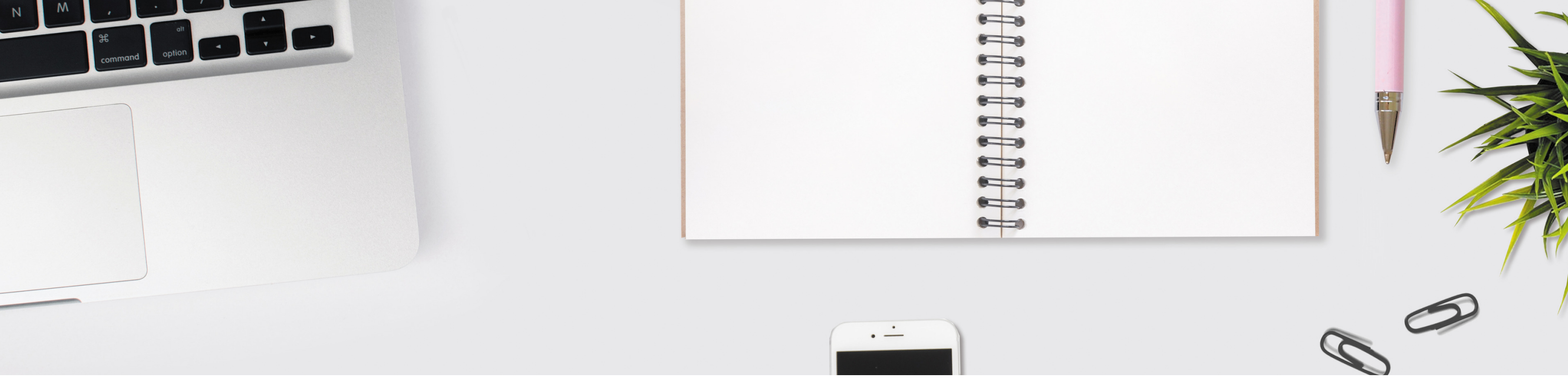
ANNUAL CHECKLIST

- [ ] Participate in the annual forecasting process.
- [ ] Prepare for and participate in an annual performance evaluation with your manager.

SALES MANAGEMENT CHECKLIST FOR SALES MANAGERS

DAILY/AS-NEEDED CHECKLIST

- [ ] Provide coaching & mentoring.
- [ ] Assist in the development of and adherence to processes.
- [ ] Assign leads to salespeople.
- [ ] Monitor opportunities and activities in the CRM system.
- [ ] Monitor industry-wide news to identify prospecting opportunities.
- [ ] Review Playbook and CRM updates for your sales team.



WEEKLY CHECKLIST

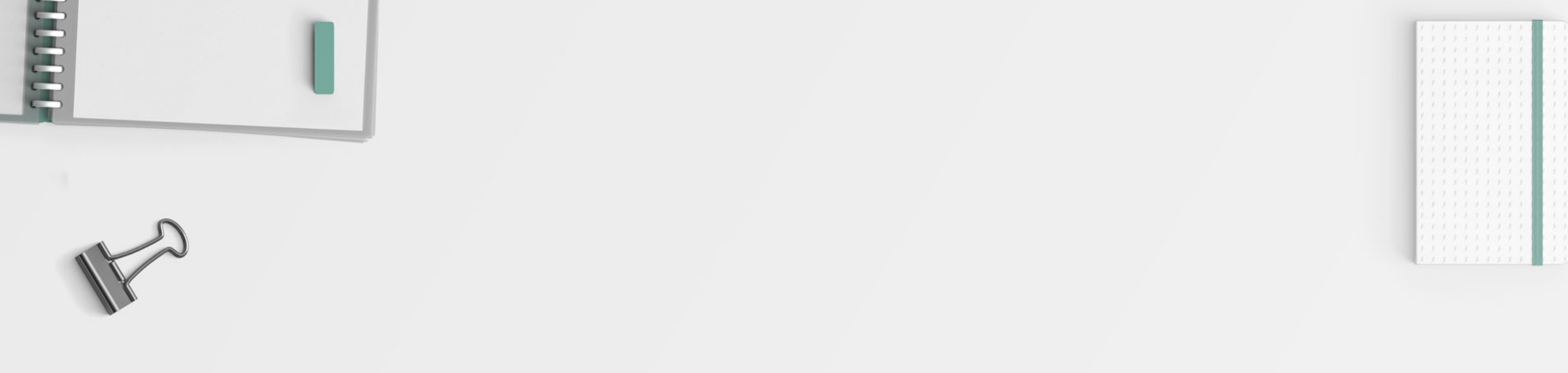
- [ ] Facilitate weekly sales team meeting, using best practices in the PlayBook.
- [ ] Solicit success stories from your team and document them in the PlayBook.
- [ ] Review best practices from the PlayBook and update them if applicable.
- [ ] Set activity and opportunity goals and monitor the results.
- [ ] Review salespeople's weekly goals & wins, and respond when appropriate.
- [ ] Conduct one-on-one meetings with each of your salespeople.
- [ ] Update your sales team's coaching journals.
- [ ] Run and review weekly reports out of the CRM system.
- [ ] Review your team's sales appointments and make sure each has an agenda.
- [ ] Review all new D.E.A.L. documents.

WANT THE DEAL DOCUMENT TEMPLATE?

CLICK HERE!

MONTHLY CHECKLIST

- [ ] Set monthly goals:
  - [ ] Number of new D.E.A.L. documents
  - [ ] Number of new opportunities
- [ ] Review monthly goals & team's performance on the previous month's goals.
- [ ] Review each salesperson's Client Evolution Model Advocate and Partner accounts to make sure they are being supported according to the quarterly territory plan.
- [ ] Review your salespeople's prospecting action plans and provide feedback.
- [ ] Review company performance with the entire management team.
- [ ] Run and review monthly sales reports.



QUARTERLY CHECKLIST

- [ ] Set quarterly goals and review your team's performance on the previous quarter's goals.
- [ ] Run and review quarterly sales reports.
- [ ] Manage your sales team as they review their accounts according to the Client Evolution Model and adjust them if necessary.
- [ ] Develop Territory Plans with your salespeople, specifying both sales and marketing activity.
- [ ] Prepare and deliver quarterly performance management reports to each sales team member.

ANNUAL CHECKLIST

- [ ] Deliver sales team bonuses and awards.
- [ ] Prepare and deliver annual performance management reports to each sales team member.
- [ ] Set annual revenue goals for your department or area and for each salesperson.
- [ ] Set annual budget for your department or area.
- [ ] Meet with the entire management team to set goals and align on strategies for the coming year.

CONCLUSION

“SOMEONE'S SITTING IN THE SHADE TODAY BECAUSE SOMEONE PLANTED A TREE A LONG TIME AGO.”

WARREN BUFFETT

Managing the details of the sales process isn't always easy, but it's not impossible!

Try out the checklists in this eBook—at a minimum they'll begin to nudge you in the right direction!

Just be sure to give each process time to work and be consistent.

And don't forget to add any of the tips you learned along the way to your Sales PlayBook!

Happy Selling!

WORRIED ABOUT MAKING THE CHECKLISTS STICK?

CLICK HERE TO DOWNLOAD OUR GUIDE TO TIME MANAGEMENT