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# SALES PERFORMANCE MANAGEMENT

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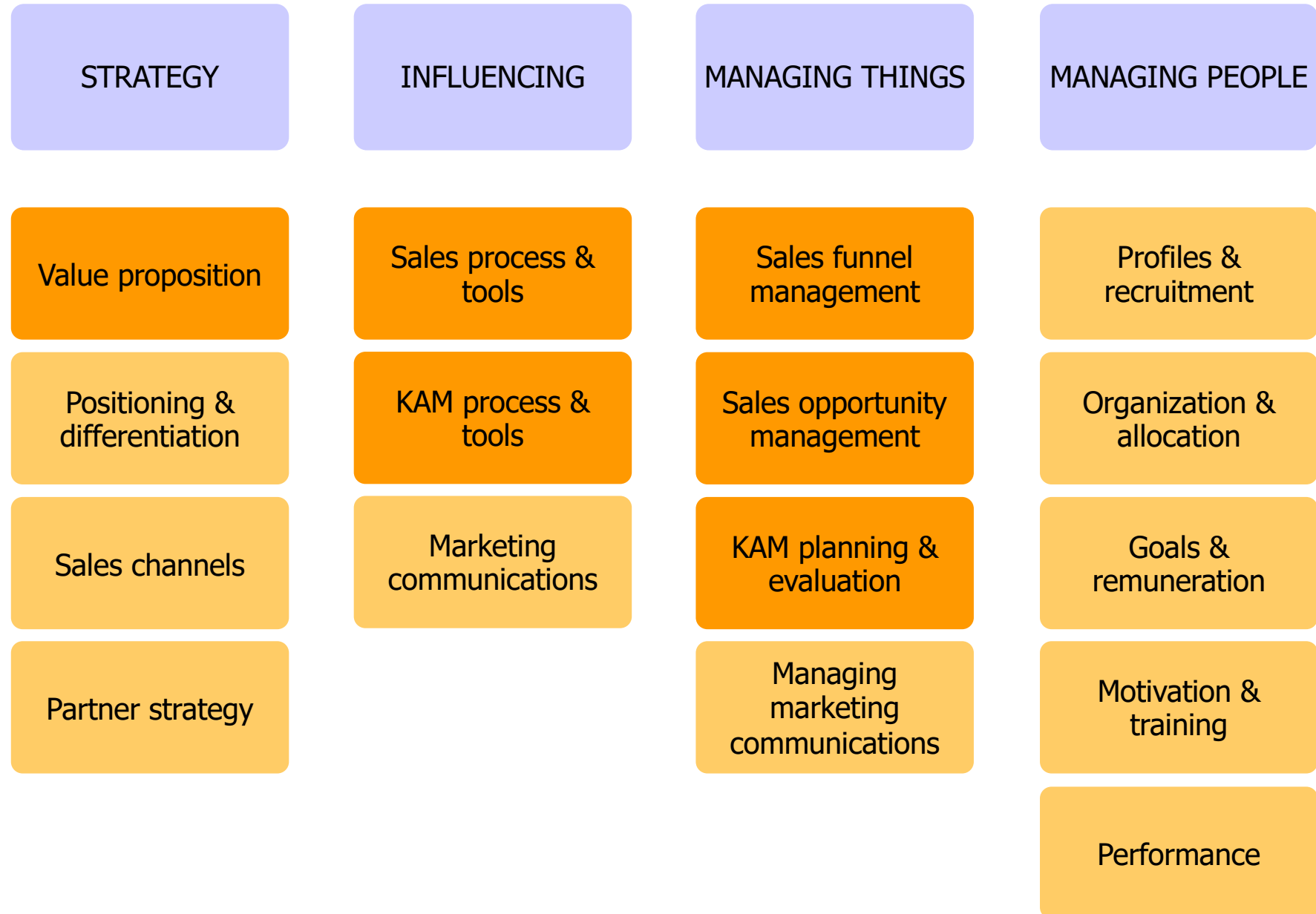
# SALES PERFORMANCE MANAGEMENT

*In your opinion, what elements of a sales organization's work need to be managed?*

Discuss this question in break-out rooms for 10mins and take notes. Then post your group's findings into chat.

GROUP DISCUSSION

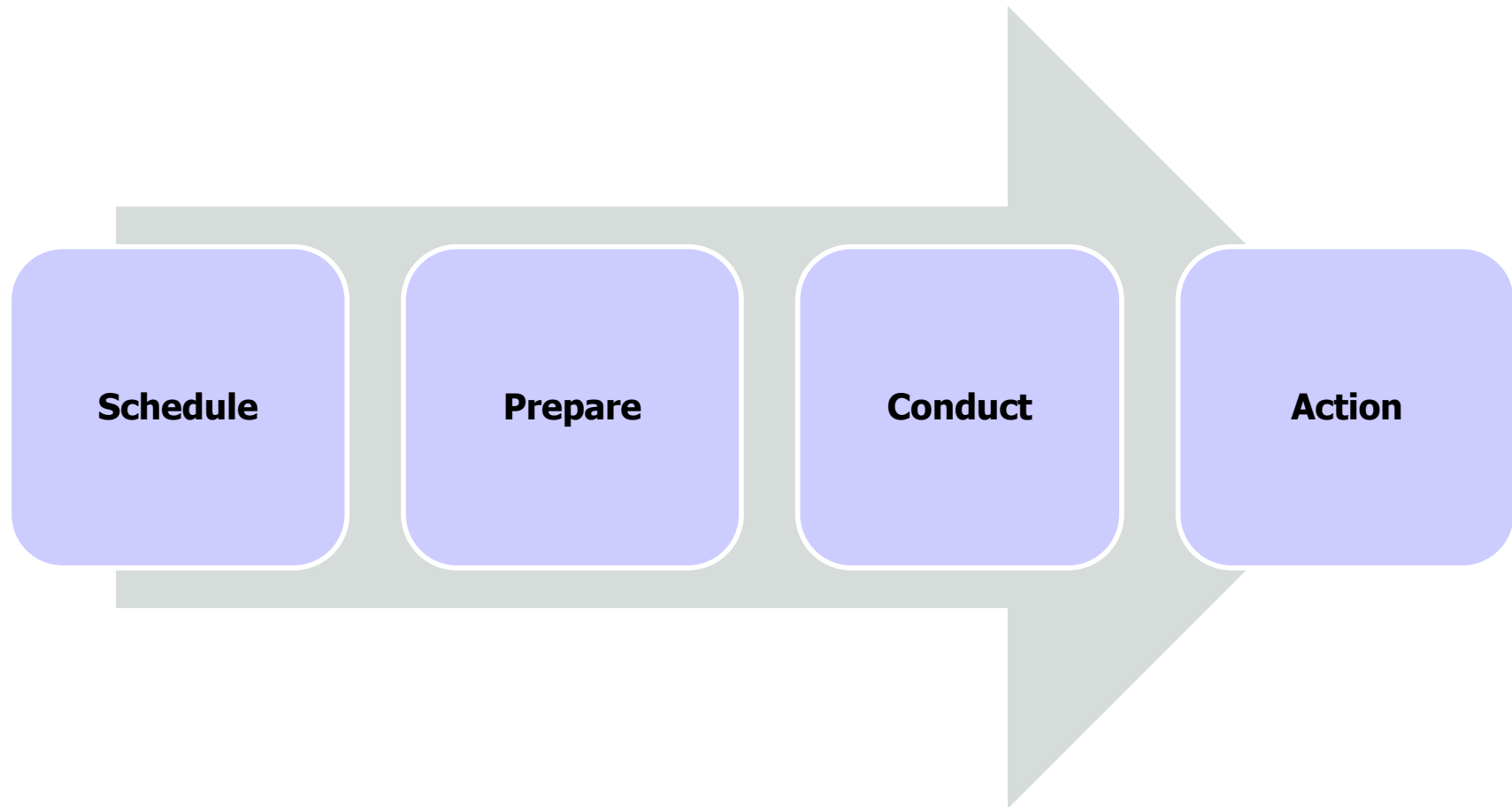
# SALES MANAGEMENT FUNCTIONS



# SALES PERFORMANCE MANAGEMENT SYSTEM

<b>WHAT?</b>	<ul style="list-style-type: none"><li>• Framework for activity, opportunity &amp; funnel management</li><li>• Individual performance (preparation and coaching)</li><li>• Sales team performance (preparation and coaching)</li><li>• Sales planning</li></ul>
<b>WHY?</b>	<ul style="list-style-type: none"><li>• Immediate feedback</li><li>• Focus on learning the right competencies (tasks &amp; tools)</li><li>• Develop shared best practices</li><li>• Create “right” sales culture</li></ul>
<b>HOW?</b>	<ul style="list-style-type: none"><li>• Regular team meetings with fixed agenda</li><li>• Regular performance reviews</li><li>• Frequent opportunity coaching</li><li>• Tools</li></ul>

# SALES PERFORMANCE MANAGEMENT PROCESS



# INDIVIDUAL PERFORMANCE COACHING

*What would be your agenda items for individual sales performance coaching?*

Discuss this question in pairs for 10mins and take notes. Then join your findings with another group and prepare to share your findings.

GROUP DISCUSSION

# INDIVIDUAL PERFORMANCE COACHING



# INDIVIDUAL COACHING MEETING

Agenda Item	Discussion topics	Supporting Material
<b>TOP5 Opportuniy review &amp; coaching</b>	<ul style="list-style-type: none"> <li>• What has happened with the TOP5 opportunities since the last coaching?</li> <li>• What activities planned/agreed to progress the opportunities?</li> </ul>	Opportunity Coaching questions
<b>Personal Funnel</b>	<ul style="list-style-type: none"> <li>• How is the individual funnel value vs targets?</li> <li>• How are the opportunities distributed across the sales stages? (= funnel shape)</li> <li>• Which opportunities have moved to a new sales stage?</li> <li>• Which opportunities have not moved since the last review?</li> <li>• Any outstandings offers with check-date passed?</li> </ul>	Funnel Report Other (CRM) reports
<b>Sales Activity Review</b>	<ul style="list-style-type: none"> <li>• How much customer facing time there has been?</li> <li>• How many customer meetings?</li> <li>• How many contacts, meetings with new customers?</li> <li>• How many new opportunities added to the funnel?</li> </ul>	Sales Activity Report
<b>Sales Planning</b>	<ul style="list-style-type: none"> <li>• Allocation of time on lead generation</li> <li>• Which opportunities will be worked upon? What activities planned?</li> <li>• What other customer facing activities planned for the next period? Which customers to address?</li> </ul>	



# SALES TEAM MEETING



# SALES TEAM MEETING

Agenda Item	Item description	Discussion topics	Supporting Material
Funnel Management	<ul style="list-style-type: none"> <li>Present team sales forecast</li> <li>Present team Funnel Report</li> </ul>	<ul style="list-style-type: none"> <li>Is the short term sales forecast in line with targets?</li> <li>Are there enough new opportunities entering the funnel?</li> <li>Are there enough opportunities at every stage of the sales process?</li> <li>Is the value of the funnel sufficient to meet the long term sales targets?</li> <li>Is the funnel progressing? (are there any opportunities not moving?)</li> </ul>	Funnel report
Opportunity Review	<ul style="list-style-type: none"> <li>TOP5 Opportunities</li> <li>Won/Lost deals</li> <li>New Offers</li> <li>New Opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Analyse TOP5 opportunities by reviewing the Opportunity Coaching questions</li> <li>Present the new opportunities by using the Opportunity Qualification questions</li> <li>Brief analysis on won/lost deals</li> <li>Highlight non-moving opportunities and planned actions</li> </ul>	Report on won, lost opportunities, new offers, new opportunities
Sales Activity	<ul style="list-style-type: none"> <li>Present team sales activity report</li> </ul>	<ul style="list-style-type: none"> <li>Review the sales activity metrics to verify there is enough contacts to other activities to ensure funnel progress</li> </ul>	Sales Activity Report
Any Other Business	<ul style="list-style-type: none"> <li>Announcements</li> <li>Campaigns</li> <li>Market News</li> </ul>	<ul style="list-style-type: none"> <li>Planned Marketing activities</li> <li>Learning from others</li> <li>What is happening in the marketplace? Any changes influencing out customers? Industry in general?</li> </ul>	

# SALES MANAGEMENT CADENCE

MEETING	W1	W2	W3	W4	W5
Sales team meeting	X				
Individual coaching meeting	X		X		X
Individual performance coaching					X
KAM management		X			