THE

ULTIMATE SALES PLAYBOOK

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Whether you're an individual sales pro, a sales leader, or a marketing demand generation professional, it's important to kick off the next quarter nice and strong. You'll want to regroup from this previous quarter and properly align communication, execution, and reporting so everyone's on the same page and you can move at a more efficient rate in Q2. This guide will give you tips for what you should do before, during, and after your sales kickoff meeting so you can hit your goals and grow exponentially.

LET'S GET STARTED...

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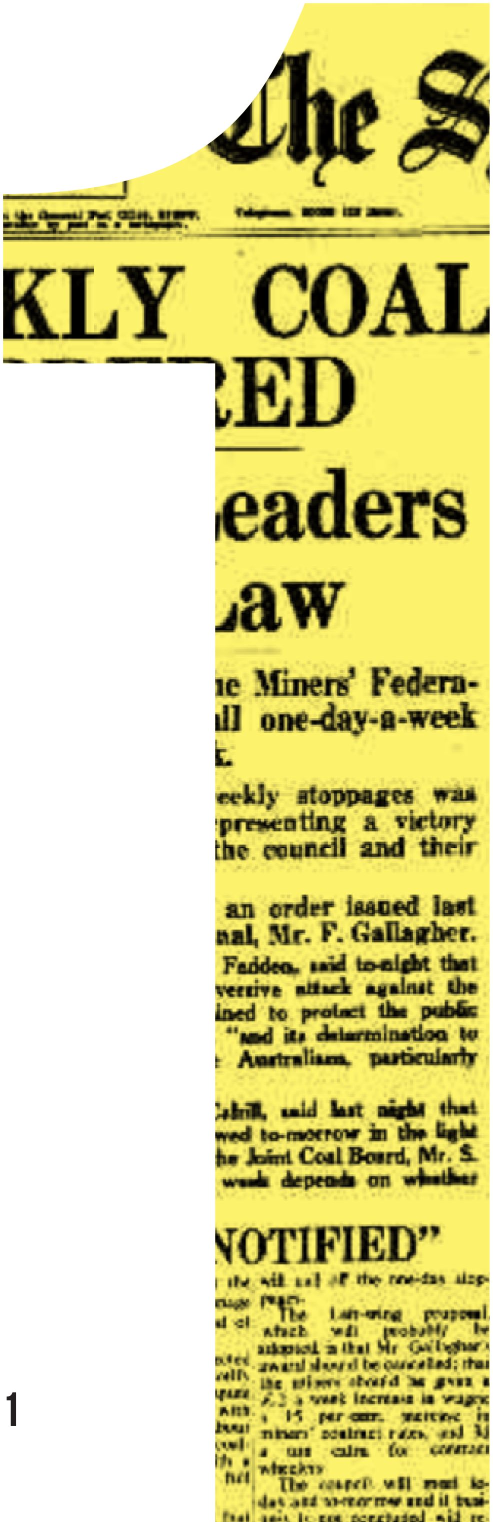
PRE SALES

A time to reflect



Before thinking about how you're going to tackle Q2's quota, consider how you executed against your goals in Q1. Did you exceed the quota? Did you miss it by a little or a lot? No matter what the outcome, determine what specifically led to your success or failure. And don't just ask your gut - consult the data. Dig into your CRM and calculate the percentage of deals you won and lost based on how many leads you worked from.

In addition, analyse your pipeline. Was there a particular stage where deals seemed to get stuck? If so, why? Spend some quality time buried in analysis, and then write down goals for the new quarter based on where you were weak or strong in Q1. If you require coaching, don't be shy - seek it within the next 30 days, either from your manager or an experienced colleague. It's only by correcting your problems that you'll get better, so own them openly and get started sooner rather than later.

Clean out your pipeline

Odds are, you didn't close every single deal that was in your pipeline last quarter. Which means it's time to do some spring cleaning. Review each and every deal in the CRM, and ask yourself: Is this likely to close this next quarter, or is it dead? Honesty isn't only the best policy here - it's critically important. Being unrealistically optimistic will only hurt when it's time to construct your plan for the year. If you're counting on revenue that is never going to come in, you might not generate the requisite number of leads to make your quota. There's also a third category between alive and dead. Some companies might still be good prospects but are unlikely to buy in the foreseeable future. Take note of these buyers and hand them back to Marketing for additional nurturing.

BREAK DOWN YOUR TARGET

A giant annual quota number can be scary. But breaking it down into monthly or even weekly amounts can make your yearly goal seem a lot more attainable. Once you have 12 or 52 mini-targets, don't stop. Next, determine the amount of activity you'll need to complete in order to hit each goal. Using your personal lead-to-customer conversion ratio (if you don't know it, figure it out using your either your 2014 data or Q1 data), calculate how many leads, connect calls, presentations, and any other actions you'll need to do to convert the requisite number of prospects and earn the requisite amount of revenue.

Note: *If you don't know your personal lead-to-customer conversion ratio, make sure to figure it out based on your historical data, and not the sales force average. This will give you the most accurate number on which to base your Q2 (and the remainder of 2015) plan.*

CLEAN UP CRM DATA

Now, no judgment here, but data entered into the CRM isn't always the tidiest. Since Marketing uses CRM data to nurture leads through email and other campaigns, it behooves salespeople to clean up any messy data. After all, who likes to receive an email addressed to ""? What might be shorthand to you looks like sloppiness to your prospect.

Identify your target accounts in your CRM

For those of you who have named accounts identify who you is going to be the focus of your Account Based Sales Development. By narrowing your outbound sales focus to a smaller number of accounts that are going to be have the biggest impact to your revenue number you enable your manager and marketing team to provide support throughout the quarter.

Prepare to meet with your manager

During the first meeting of the quarter with your sales manager, he or she will expect to see your pipeline, hear your plans for making quota, and learn your goals. If you've completed the exercises above, you'll be ready. Make sure to ask your manager if there's any other information he or she would like to talk about, and prepare for this conversation in advance of your meeting.

FIND THE #1 REP OF Q1

The top rep of the previous quarter or year and other individual sales awards will likely be announced at the sales kickoff. Make note of who had a record-breaking year and go out of your way to meet and talk to this person. Invite them to lunch or have a conversation during break and pick their brain about what they did that made them so effective. How does their process differ from yours? Are there practices you could add to your routine to make you more successful, or are there extraneous steps you could get rid of? Riding the high of their great year, the top performer will be happy to give you a glimpse into their methods.

INTERNALISE THE TARGET BUYER FOR Q2

When the head of sales or CEO takes the stage, he or she will explain the strategic sales plan for Q2. In particular, listen for any changes to the target buyer personas. Is the company going after a different type of prospect this quarter? Your organisation could be pivoting its target buyer in terms of:

Company size

Industry

Pain points

Goals

Location

These changes could be driven by the introduction of a new product, a competitive move, or a strategic decision. After you've internalised the characteristics and attributes of the new target buyer persona for Q2, strive to understand what's causing this shift. This will help you to better approach your new or adapted target buyer with additional context and insight. For instance, if a major competitive move prompted your company to shift upmarket, this knowledge can help you better position your offering vs. theirs.

ABSORB INSIGHTS

According to The Challenger Sale, prospects will buy from salespeople who can teach them something new about their business or industry. More and more sales experts are espousing the virtues of insight-based selling, and an increasing number of sales organisations are embracing this trend. So in addition to talking about the new target buyer of Q2, your sales leader will probably also share insights to help you spark this prospect's interest. These could be a cost saving opportunity that the buyer isn't aware of, a strategic change that would benefit them, or an industry trend that threatens their business, among other possibilities. Make sure to carefully note these insights for use in cold messaging to capture your buyer's attention.

If your sales leader does not offer insights, you should strive to find some yourself after the kickoff meeting ends. If you strike on a framework or statistic that significantly boosts your connect or close rates, share with your manager as well as colleagues in marketing.

DISCOVER THE INSIGHTS YOU'LL BE MEASURED ON

The #1 metric salespeople are measured on will likely never go out of style: Quota.

But most sales organisations also judge salespeople on other metrics as well, such as customer satisfaction, prospect-to-customer conversion, or activity numbers. While you're at the sales kickoff, find out the top three to five metrics you're going to be judged on this year. A solid conception of what solid performance looks like to leadership can help you plan to be successful according to those guidelines.

Frame product updates in terms of value

Sales leaders often present new products or updates to the sales team during the annual kickoff. While this exercise is important, bear in mind that prospects don't have the time or patience to listen to a list of features. Sales pitches should be about your prospect, not about your company. So instead of zeroing in on the unique attributes of the product or service you're selling, strive to make it about buyers by framing features in terms of the value they will reap.

In product sessions, key in on the results customers can expect to see, and ask questions about ROI and value. You should also become an expert on the product, but prioritise learning about its results first.

DURING SALES

Speak up about social selling

Buying habits have changed, and the writing on the wall indicates that social selling will become an ever more important weapon in the salesperson's arsenal. Consider the following statistics:

63%

of VP-level and C-suite executives used social media platforms to support their buying decisions in the last year.

(SalesForLife)

64%

of teams using social selling attained their quota, as compared to 49% of teams that hadn't incorporated social media into their sales processes.

(Aberdeen)

72.6%

of salespeople who incorporated social media into their processes outperformed their colleagues.

(Social Centered Selling and A Sales Guy)

Despite these figures, social selling wasn't a major focus for many sales organisations in 2014. According to HubSpot's State Of Inbound Sales report, only 7% of sales organisations named social selling as a priority for 2015. Something's not adding up here. If your organisation hasn't yet jumped on the social selling bandwagon, talk to your colleagues about whether or not social is helpful for them, and brainstorm ways to systematise effective social selling practices. You might just start a valuable movement.

ADJUST QUALIFICATION TACTICS TO APPEAL TO TARGET BUYER

If your company's target buyer is changing in Q2, you'll need to shift your qualification and prospecting processes accordingly. Remember to adjust your discovery questions to reflect the new type of buyer you're going after.

For instance, while a prospect might have been qualified with a budget of $100,000 in the past, you might be seeking budgets of $200,000 or more going forward. Keep in mind that the answers that were once desirable might not be anymore. Your prospecting and messaging will need a facelift as well. Not every type of buyer responds the same way to the same messaging. What outreach channels will work best for your new target buyer, and what type of language and message do they prefer? Make sure to update any templates you plan to use in the new year to reflect changes made to the buyer persona.

POST-SALES

Refine your value proposition

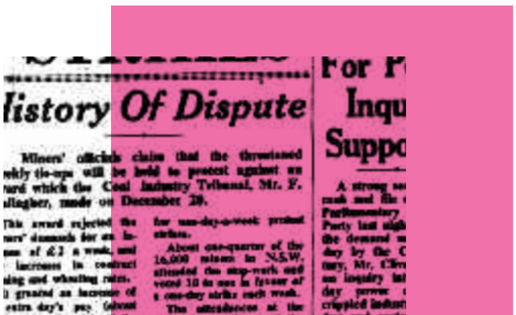
Sales messaging should be as customised and personalised as possible, but having a concise and compelling value proposition in your back pocket can help quell the “What is this about, anyway?” objection quickly. Remember to tweak your company’s value proposition based on any strategy shifts that were announced at the sales kickoff. For instance, work in new products or services that your company now offers, or play up specific benefits to appeal to industries the company is focusing on.

Read new marketing/ sales collateral

Once you’re fully in the swing of the new year, it’s often hard to find time to read and internalise sales enablement collateral. So make sure to set aside a few hours after the sales kickoff to thoroughly review new content. Bear in mind that these documents are prepared specially to make you more effective at selling and closing deals. The more you can incorporate the information into your processes, the more successful you will be. Look out specifically for buyer insights and behavioral data.

REVIEW SLA BETWEEN SALES & MARKETING

Sharing a common goal and putting in place clear set of expectations between sales and marketing will reduce grey and opinionated conversations. Let the data drive the conversation. Is the marketing team hitting the numbers that Sales require to be successful? Review the conversion rate of lead to customer by the Sales team. It's important sales and marketing leaders look to collaborate in 2015.



FINAL THOUGHT

Now you've discovered what individual sales pros should do before, during, and after a sales kickoff meeting. No matter what role you're in, it's important to reflect on Q1, get organised, identify any communication gaps, and set up SMART goals and metrics for Q2.

If you don't have a Service Level Agreement (SLA) set up between your sales and marketing teams, take a look at this blog post: "Make marketing your customers and sales team love." This post will dive into some of the areas our clients saw improvements within their campaigns this year and what that might look like in comparison to your campaign or strategy.

To learn more about how to improve your sales process, reach out to us via any of the channels below:

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