

INFORMATION GUIDE

Sales & Sales Management Training Solutions

There are two parts to this information on our Sales & Sales Management Training Solutions.

Firstly there is an overview of hr TEAM – who we are, our approach and how we work with our clients.

The second part provides you with the detail of the concepts and learning materials for people in sales roles... from new starters in the role through to account managers and sales managers.

If you would like further information on specific items having read this guide, or if you would like to arrange an initial conference call or meeting, please contact us.

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1. INTRODUCTION TO HR TEAM

We are a training and development consultancy working in two specific areas.

- Sales, Negotiation and Sales Management development skills
- Leadership, Management and Personal Skills Development

Established in 1989, we have many years experience working with a number of clients in a range of market sectors. These include IT, Telecoms, Manufacturing, Business Consultancy, Professional Services, Electronics and Construction.

As part of ELDA – The European Leadership Development Alliance – we work with clients in developing and delivering pan-European learning solutions. ELDA members are represented in the UK, Germany, France, Italy, Spain, Austria and Hungary. Our website has full details of ELDA partners and locations.

2. OUR AIMS, VALUES AND APPROACH

When we founded the company, we have a clear vision of what we wanted to be, the services we would offer, and how we wanted to establish and develop relationships with our clients.

Of course, since then the world, the environment, our client's needs and expectations and the economic conditions have changed! Like any business we have evolved and developed but we believe our underlying values and beliefs are as valid today as they were then.

Our Aims and Aspirations...

To develop long term business relationships with our clients and to become an integral part of their team for mutual benefit.



How do we go about achieving those aims and expectations?

It is a reasonable assumption that any business would have an aim of developing long term client relationships!

We understand that this relationship has to be earned. How? We believe by **delivering value**.

Value at two levels...

- ✓ To contribute to the ongoing skills and knowledge of the people in our clients' businesses

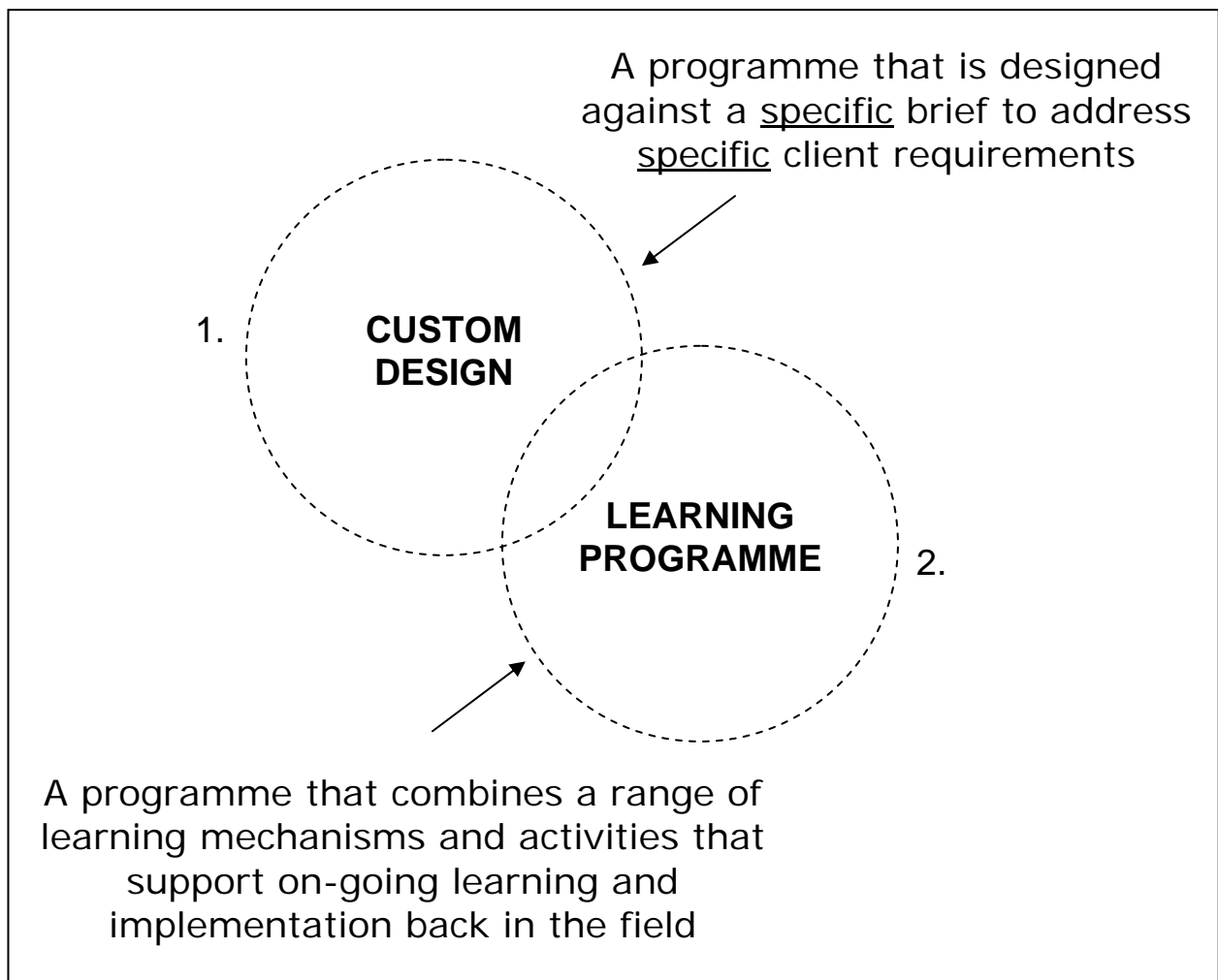
- ✓ To contribute to the achievement of our clients' business goals and strategies, by ensuring that the training and development we deliver is focused, relevant and aligned to their business priorities.

**Our recognition of the need to demonstrate
value means that we are focused on defined,
measurable outcomes**

Approach

We have described our aims. We have discussed the need to demonstrate value to achieve them. **What is our approach in converting these aims and plans to reality?**

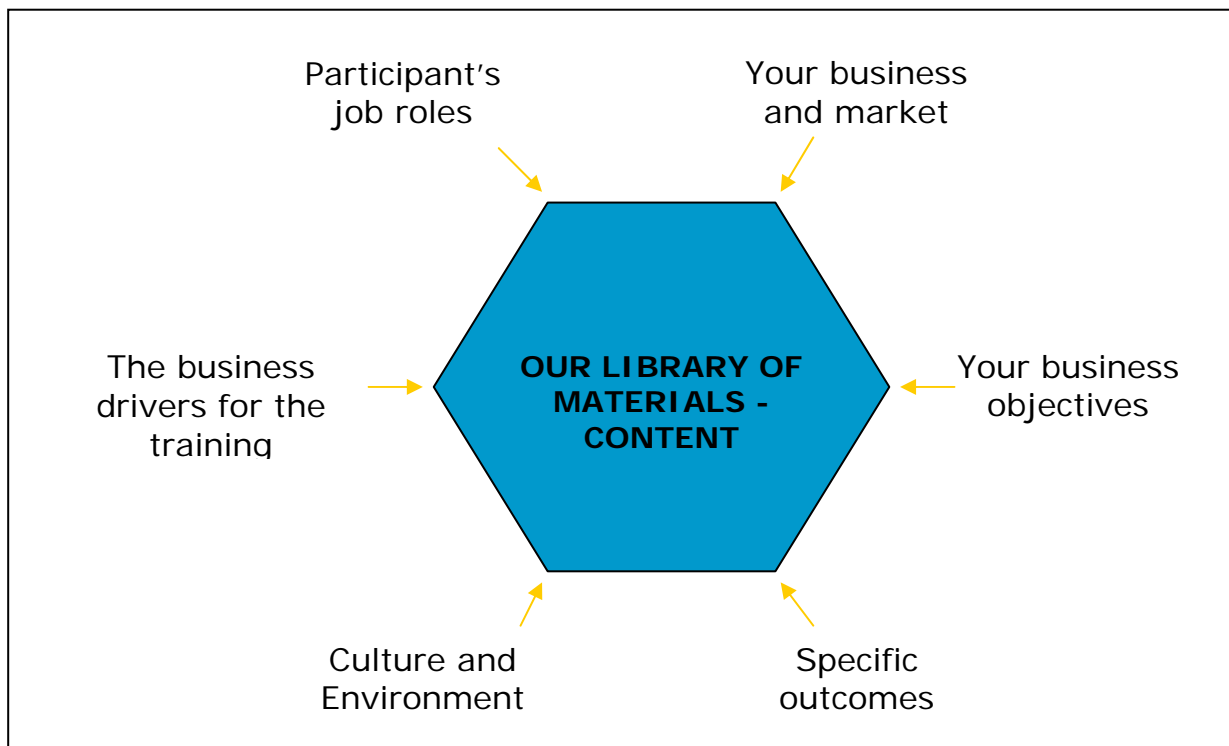
These are two key concepts that underpin our approach in working with our clients...



Custom Design

Tailored, bespoke, custom designed – these are all terms commonly used by training consultancies. What do we mean by “custom design”? Firstly, we do not claim to reinvent wheels for every programme! Over many years we have designed, developed and refined a massive **knowledge bank** in sales and sales management training and development. We have a library of models, concepts and materials. These are used as the start point in developing a specific client programme. From this we can adapt, refine and add to ensure absolute relevance. This is the first stage of custom design.

We then build in the **6 areas of context**...



This result... an integrated programme that is focused and relevant to the participants and the client's business.

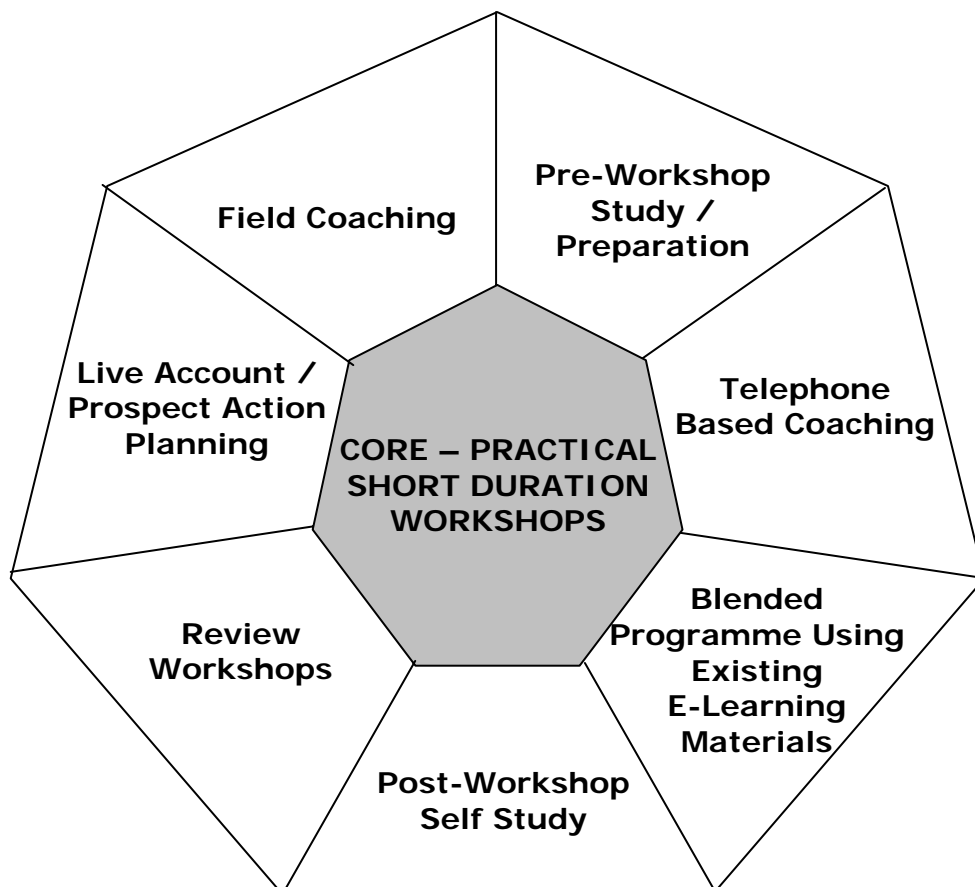
Learning Programmes

We believe that attending “isolated training courses” is usually not the most effective way for sales personnel and sales managers to learn or to be able to apply that they have learned in the field.

A learning programme, the core of which is a series of short duration, practically based workshops, involves a range of learning mechanisms.

As we believe in custom design, we do not believe that each programme must involve all of the examples below. We will recommend what is practical and relevant for any given situation.

Learning programme – possible elements...



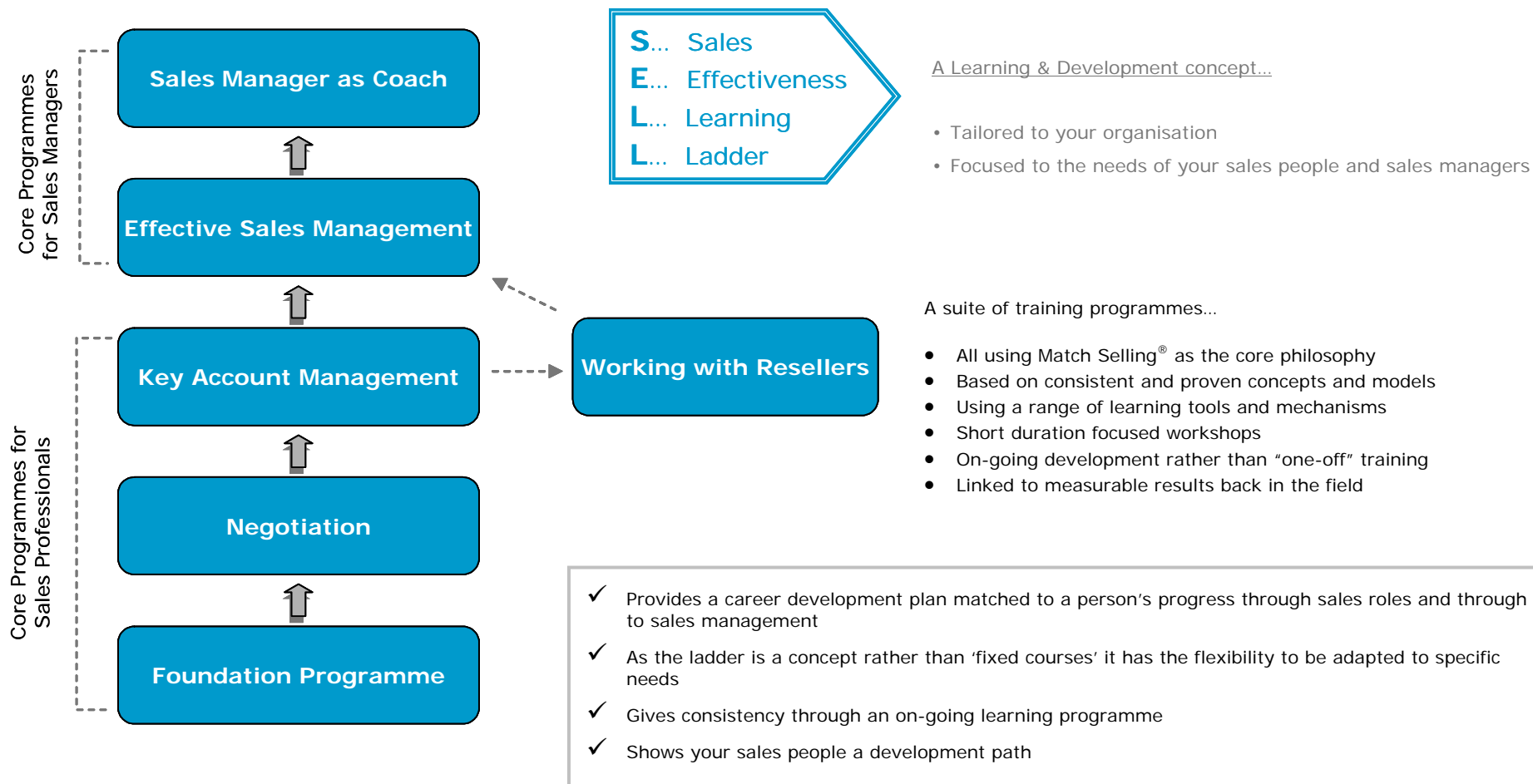
- Time effective – minimises time out of the field
- Engages people in on-going development
- Maximises implementation and improved sales results

3. SALES AND SALES MANAGEMENT PROGRAMME OVERVIEW

The main purpose of this guide is to provide you with details of the learning programmes available for sales people in a range of different roles and stages in their sales career.

As we develop custom programmes we are **not describing courses** in the following pages. We are describing concepts, models and **typical content** of the different levels of programme.

The following diagram, **THE SELL CONCEPT** - “Sales Effectiveness Learning Ladder” – describes a typical sales career progression. At each point additional knowledge and skills will be required. This provides the sequence for the detailed content of this information guide.



Custom Designed Learning Programmes for Sales Personnel and Sales Managers

4. MATCH SELLING® - THE BASIC BUILDING BLOCK

Match Selling® provides the underpinning philosophy behind all sales programmes that we develop with clients.

It is based on the core principle that all selling, regardless of product / service, industry or complexity is a **matching process**.



This is not revolutionary! It is describing a solutions based sales approach. Our expertise is in integrating this core principle for success into all levels of sales development programmes.

5. DIAGNOSTIC TOOL – “The Effective Sales Profile”

The “Effective Sales Profile” is a competence model that defines the knowledge, skills and attributes that are required for a person to be effective in a sales role.

A generic model that has been developed from a range of inputs, it can be adapted and refined into a specific profile for the roles in your sales team.

You may have your own in-house profile; the training and development needs of people in your sales team may be clearly defined.

If not, then The Effective Sales Profile is a powerful tool to enable you to design the profile and then assess your sales people against it.

It can be a start point for developing a focused, relevant programme.

EFFECTIVE SALES PROFILE

- ✓ 6 Competence areas
- ✓ 33 competence descriptors
- ✓ Ranking scale for each descriptor
- ✓ Assessments on scale 1-6

A tool for arriving at focused training needs...

- Using this model as a based, design the profile for effectiveness in the sales roles in your sales team
- Assess each person in the team against their role profile

EFFECTIVE SALES PROFILE

COMPETENCE AREA	RANKING (1) A – B – C	N/A (2)	CURRENT COMPETENCE LEVEL					
			L	1	2	3	4	5
1. Communication and Influencing								
1) Displays a positive and assertive behavioural style in all communications.								
2) Employs a range of questioning skills, creating a positive dialogue.								
3) Actively listens, checks understanding and interprets information.								
4) Establishes rapport and adopts an appropriate behavioural style in a range of situations.								
5) Writes proposals in clear concise terms.								
6) Presents proposals clearly and confidently, relating products and services being proposed in terms of value to the customer.								
7) Responds to conflicts and hurdles in considered terms, manages issues whilst retaining the relationships.								
8) Motivates and influences the customer in all communications, builds commitment assertively in non-confrontational terms.								
9) Displays leadership skills in managing an account team to develop strategies and action plans to win business.								

(1) Ranking of importance of the skill requirement for a specific sales role: 1 = very important
 2 = important
 3 = not a priority

(2) Not all areas are required in all sales roles: N/A = not applicable

EFFECTIVE SALES PROFILE

COMPETENCE AREA	RANKING A – B – C	N/A	CURRENT COMPETENCE LEVEL						H
			L	1	2	3	4	5	

2. Planning and Analytical

1) Defines clear objectives for meetings with customers, plans and agrees agendas in advance.									
2) Understands what information is required from a customer, and plans appropriate questions to gain that information.									
3) Analyses and interprets information in a structured manner, to provide input to a focused account development plan.									
4) Defines clear objectives and strategies for each account, taking a short, mid and long term perspective.									
5) Implements detailed action plans to support the achievement of account objectives.									
6) Manages the dynamics of the business by reviewing objectives and plans, frequently responding and fine tuning as necessary									

EFFECTIVE SALES PROFILE

COMPETENCE AREA	RANKING	N/A	CURRENT COMPETENCE LEVEL						H
	A – B – C		L	1	2	3	4	5	6
	3. Business Perspective and Orientation								
1) Relates own goals and responsibilities to the business goals and strategy, and the other functional goals in the business.									
2) Understands a customers business, objectives, culture and environment and sees the context for solutions that focus on the customers priorities.									
3) Recognises and interprets the influences that political, economic and social factors have on a customers business.									
4) Creates equal relationships with customers by demonstrating a business person and partnership approach.									
5) Maintains / builds profitability and protects business interests by negotiating in a balanced manner with customers to arrive at mutually advantageous agreements.									
6) Objectively analyses situations and is prepared to take considered risks to progress a business opportunity.									

EFFECTIVE SALES PROFILE

COMPETENCE AREA	RANKING	N/A	CURRENT COMPETENCE LEVEL						H
	A – B – C		L	1	2	3	4	5	6
	4. Product and Market Awareness								
1) Has detailed knowledge and understanding of all products and services in the company's portfolio.									
2) Understands the applications for the products and services, and can translate features into value for customers.									
3) Has an understanding of the overall market and recognises the implications of changes and developments in the market place.									
4) Has knowledge of the products and services of principal competitors and is able to analyze competitive advantage in relation to specific customer needs.									

COMPETENCE AREA	RANKING	N/A	CURRENT COMPETENCE LEVEL						H
	A – B – C		L	1	2	3	4	5	6
	5. Self Management								
1) Is focused to the achievement of goals, reviews results against goals and plans for improvement.									
2) Makes effective use of time by focusing on customers that can provide profitable business.									
3) Balances short, mid and long term activities.									
4) Prioritises effectively when unplanned tasks conflict with scheduled actions.									
5) Shows resilience and patience when working on strategic long term sales opportunities.									
6) Objectively analyses where time is being invested and the possible returns, and makes appropriate decisions.									

EFFECTIVE SALES PROFILE

COMPETENCE AREA	RANKING A – B – C	N/A	CURRENT COMPETENCE LEVEL						H
			L	1	2	3	4	5	

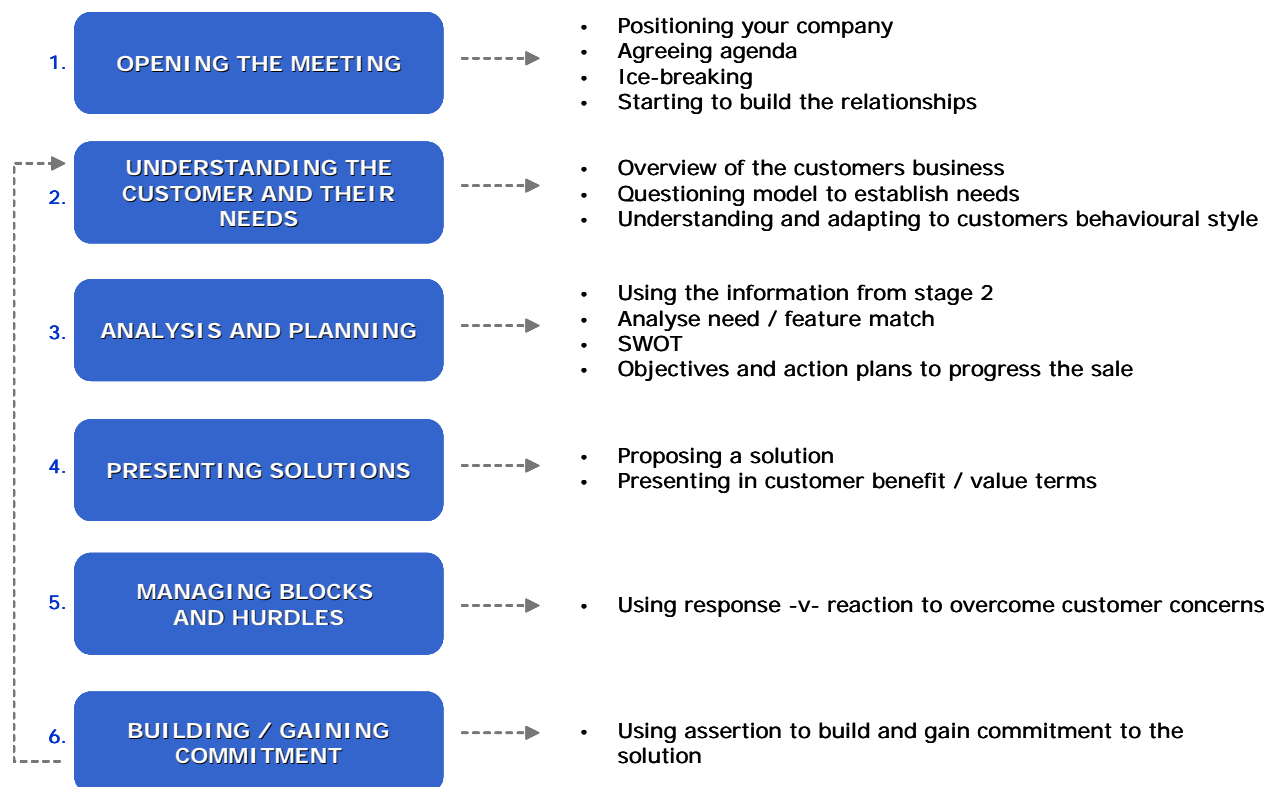
6. Team Orientation

1) Effectively utilises the resources of the team to develop business and maximise opportunities.									
2) Shares ideas for developing the overall effectiveness of the team.									

6. FOUNDATION IN SALES SKILLS

A typical model we use in foundation level programmes is the 6 Point Plan.

6 Point Plan - Basic Building Block for the Foundation Programme



This Model can be adapted to your own sales environment

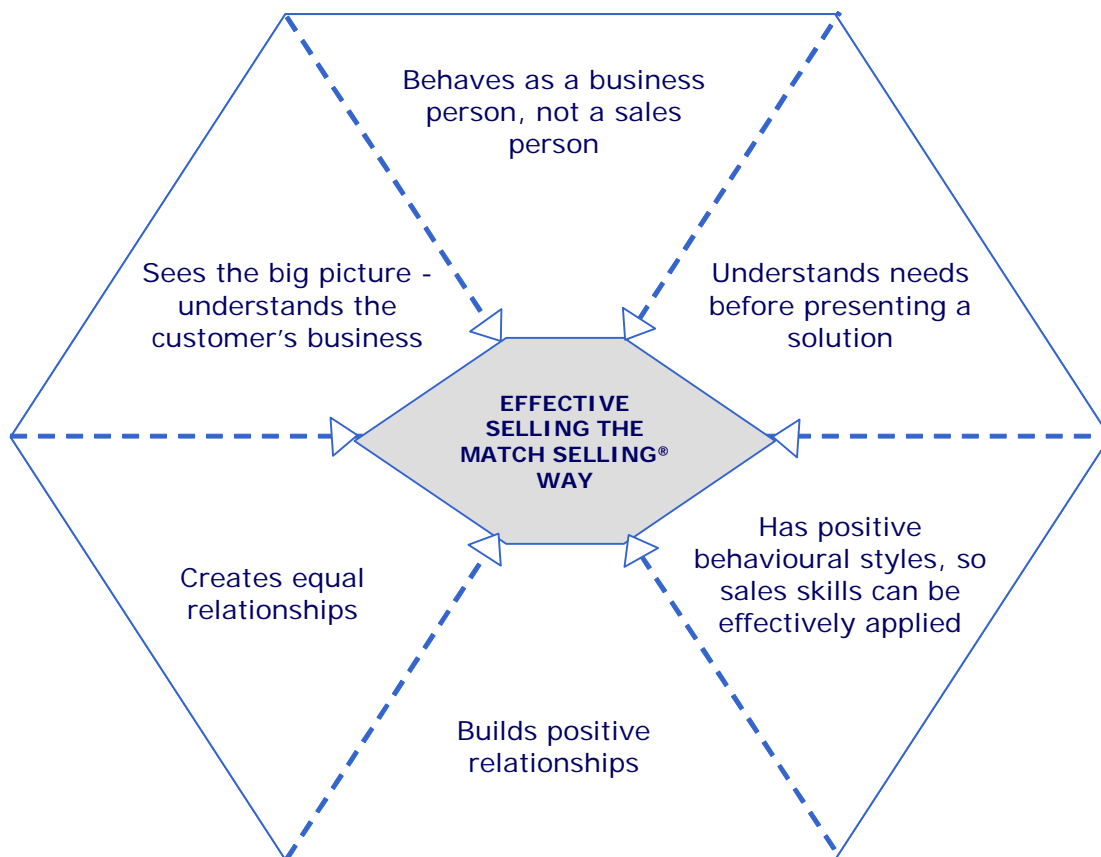
Examples of areas / topics in a Foundation Level Programme

- Introduction of the 6 Point Plan as an overall framework
- The positive behavioural style required for effective application of core selling skills
- What is involved in opening the meeting? Starting to build the relationship, agreeing the agenda, initial positioning of your company
- Finding out about the customer and their needs using a 6 stage model
- Understanding customer interests and motives based on "SIIS" – save, increase, improve, solve
- How to adapt behavioural styles to meet customer style, to develop positive relationships
- Analysis and planning once needs have been identified. Analysis of need / feature motives, competitor comparisons, SWOT, objectives and action plans
- Presenting solutions in customer benefit terms
- Handling concerns and objections by applying response –v- reaction concept
- Gaining commitment n an on-going building block basis

The objective

Effective Selling: The Match Selling® Way

To develop a sales person who...



7. ACCOUNT MANAGEMENT AND DEVELOPMENT

What is account management?

Account Management is the process of maximising the return on your investment in a customer, by defining and actioning appropriate plans that will enable you to build on the present to manage the future.

How do we develop Account Management skills in your team?

- ✓ By building on the core selling skills that your people will have developed

- ✓ Introducing the additional planning, analytical, strategic and resource management skills needed

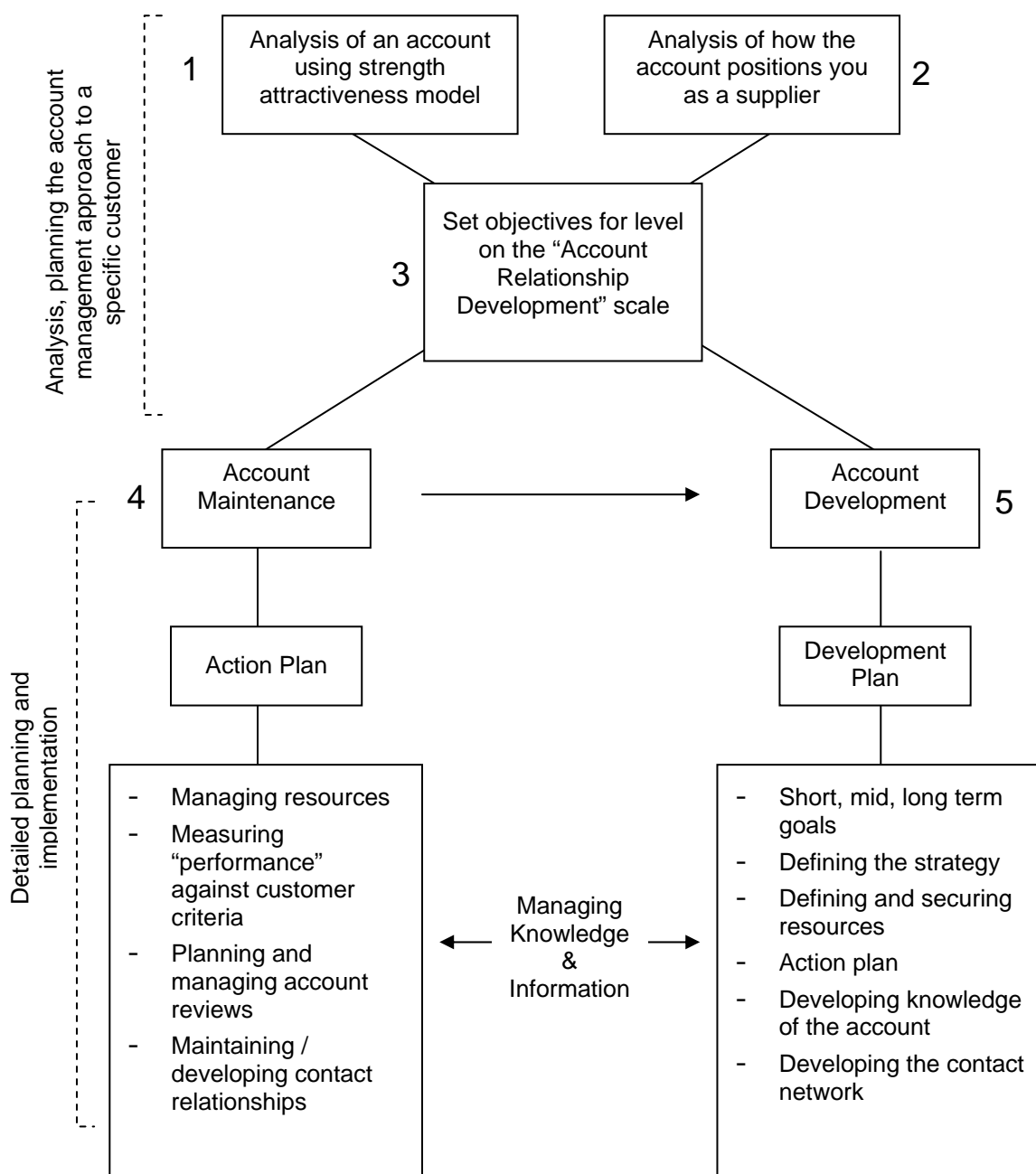
Further information is on our website at:

www.hrteam.co.uk/kam

The Framework for Account Management

A framework based on...

- Analysing the attractiveness of an account to you
- Defining how the account positions you as a supplier
- Setting clear short, mid and long term objectives
- Developing and implementing maintenance and development plans



Examples of topics / areas covered in an Account Management Programme

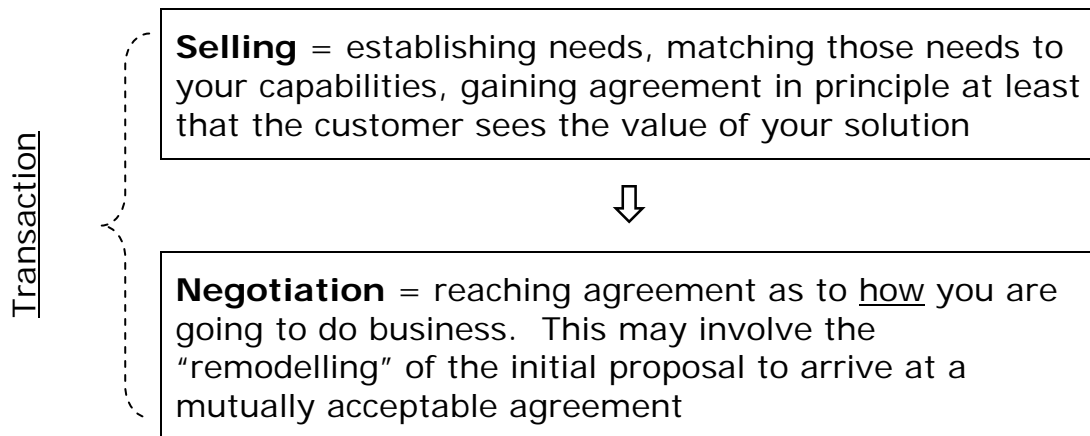
- Why Account Management?
- Account Management definition
- Account Management Model
- Establishing the Account Management approach using the 5 level relationship model
- Account analysis using strength / attractiveness criteria – attractiveness of the account to you, your relative strength and ability to realise the potential
- How customers position suppliers. Where are you now? Where do you want to be?
- Account Maintenance...
 - Resource management
 - Performance measurements
 - Planning and chairing account reviews
 - 6 point framework
 - Managing and developing the contact relationship
 - Account maintenance plan
- Account development...
 - Developing knowledge of the account and their business – 8 key factors, using the “Web” Model
 - Building the contact network – the 7 dimensions of influencers and decision makers
 - Project and resource management
 - Account development planning – goals, strategy, milestones and action plans

8. NEGOTIATION

Negotiation is a fundamental part of any sales person's role. The more senior the sales position, the more complex the sales environment, the more significant negotiation becomes.

A key aspect of negotiation, in the context of the overall sales process, is understanding when selling finishes and negotiation begins.

A transaction is the completion of a sale. A transaction involves selling and negotiating.



Examples of Content / Topics in a Negotiation Programme

- Definition of Negotiation
- The concept of the transaction equalling selling **and** negotiation
- The difference between 'buying objections' and 'negotiation issues'
- The three approaches to negotiation – balanced, conflict, compliant
- The benefits of balanced negotiation
- The key principles of balanced negotiation
- Planning for a negotiation meeting...
 - Defining optimum and fallback positions and your BATNA
 - Establishing customer demands
 - Defining your negotiation opportunities
 - Calculating the financial implications
 - Analysis of positions – who will be in their negotiation teams
 - Role planning if you are part of a negotiation team
- Managing the negotiation meeting...
 - Meeting framework using a 5 point plan
 - The importance of establishing a positive relationship
 - Understanding the interests behind the stated customer position
 - How to set up concession trades
 - Generating alternatives
 - Behaviours in reaching agreements
 - Creating win-wins
 - Saying no whilst keeping the dialogue open
 - Countering customer tactics

9. PRESENTING SKILLS

A key element of a sales person's role is presenting proposals. This can range from presenting one-to-one across a desk, to formally presenting to a group using PowerPoint.

As a sales person's career progresses and they move into an Account Management role, they are more likely to be involved in formal presentation situations. Often people, who are comfortable in an informal meeting environment, feel challenged when facing a group!

Inevitably the audience is influenced not just by the content of a presentation, but by the professionalism and confidence of the presenter. Being able to engage the audience, create interest and influence are core skill requirements for Account Managers.

Examples of Areas / Topics covered in a Presentation Skills Programme

- Introductions – the four elements of an effective presentation – interest, enlightenment, motivation, commitment
- Two skill sets – preparation / design and on-feet skills
- Preparation / design...
 - Audience analysis
 - Purpose
 - Content
 - Structure
 - Visuals
- Structuring, using a 7 point plan
- Structuring the main body using an “Organogram” and the Rule of 7
- Guidelines in visual design
- On-feet skills...
 - What you say
 - How you sound
 - What you look like
 - How you manage the audience
- Checklists for language
- Displaying confidence, managing nerves
- Pace, pitch, inflection, articulation
- Body language
- Managing questions and the audience

10. PROPOSAL WRITING

It is a fact that the skills and behaviour of the sales person can be the biggest differentiator a company has in an increasingly competitive market place.

However, in many cases the buying decision can be based on the written proposal. Some of the recipients of the proposal may not have been involved in previous meetings – so that proposal becomes the only basis for the decision. This situation is more likely in complex long sales cycles where there are a number of people involved in the decision making process.

An effective proposal must be...

- ✓ Clear

- ✓ Concise

- ✓ Persuasive

- ✓ Logically structured

- ✓ Professionally written

All of the previous sales effort can be wasted if the proposal does not fulfil these criteria.

Examples of Topics covered in a Proposal Writing Programme

- The concept of communication – a coding and decoding process
- The one way nature of written communication
- Writing with the reader in mind – ease of decoding, understanding and assimilation
- The importance of separating the thinking process from the writing process
- The thinking process...
 - How to structure an introduction using a 5 point planning method
 - Structuring the main body of the proposal by using an “organogram” to establish the logic and sequencing of the topics
- The writing process...
 - Translating the thinking process into a document
 - Proposal structure using a 4 point model
 - Using clear, concise language to communicate your message clearly
 - fog index and analysis

11. SALES MANAGEMENT AND LEADERSHIP

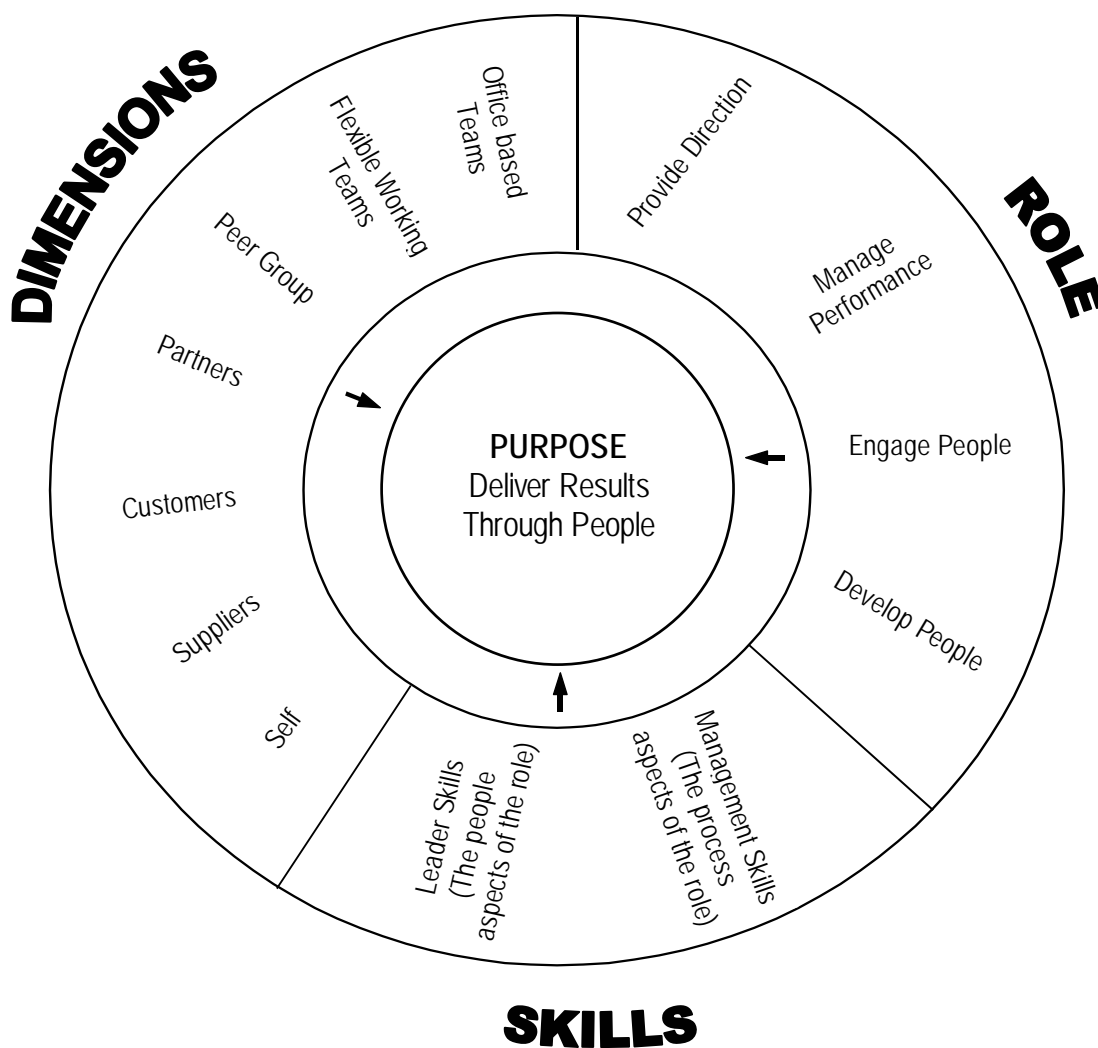
The role of a manager in any function is to deliver results through people.

In any organisation the sales function has a high profile – they are the revenue generators! Sales people are tuned into goals and targets. It is probably the most easily measured role in any business.

The sales managers' effectiveness in leading and managing the sales team will be a key factor in their performance and consequently the company's performance.

Our approach to sales management is to use our "Leader / Manager Model" as an overall framework. The concepts described in the model are relevant to all functions and can be customised to the sales manager role.

Management Model



Examples of Topics covered in a Sales Management Programme

- The leader / manager role. What is management? What is leadership?
- Influencing and communication styles for leaders
- Managing performance – objectives, targets and measurement
- Understanding the motivators of the people in the sales team
- Reviewing and developing sales performance
- Developing the team, managing field-based sales people
- Field accompaniment – the opportunities for coaching and development
- Making sales meetings effective

12. COACHING SKILLS FOR SALES MANAGERS

It is recognised that coaching is one of the most effective methods of developing people's skills and performance.

In the sales role this is particularly so. Many sales managers are field-based and spend significant amounts of time with their sales people in customer situations. These are tremendous coaching opportunities.

Coaching is a very specific skill. Many managers have difficulty in understanding the difference between their management and coaching roles.

Developing sales manager's coaching skills will maximise the return on the investment made in training your sales people. Practically based coaching will support a sales person's on-going skills and knowledge development.

Examples of Content / Topics covered in a Sales Manager Coaching Programme

- What is coaching? A definition.
- The value to the salespeople, the value to the business
- How coaching creates responsibility and awareness in the learner
- The **GROW** Model – goal setting, reality, options, will. A widely used coaching model
- Directive and non-directive coaching
- Questioning and listening – core skills for a coach
- Feedback
- The opportunities for sales managers to take a coaching role
- Field accompaniment and coaching

13. WORKING WITH DISTRIBUTORS AND PARTNERS

Many organisations operate with direct and indirect sales channels.

Whilst the fundamental of managing a third party sales organisation are the same as for managing your in-company team, there are differences.

For example...

- ? What is the leader / manager approach in managing another organisation?

- ? Is a distributor your customer or an extension of your employees?

- ? How do you get share of the partner's mind?

This specialist programme answers these and many more questions.

Example content / topic coverage in a Working with / Managing Distributors and partners Programme

- The distributor – principal relationship
- Criteria for choosing a distributor channel
- Selecting the right distributor using a profiling analysis
- Yours and the distributor's commitments
- Joint business planning
- Managing and developing the relationship
- Campaign planning – marketing and sales initiatives
- Creating and developing share of mind
- Planning and managing business review meetings
- Training and developing distributor staff
- Managing differences and channel conflict

14. CLIENT EXAMPLES

We work with many clients, from large corporates to SME's, from a range of market sectors. Below are some examples of client organisations.

- Akibia
- AXA Sunlife
- BIS Banking Systems
- BMW [GB]
- Bank of Ireland
- Belmont International
- Bexley Council
- Bio Products Laboratory
- Birse Construction
- Blue Circle Cement (LaFarge)
- Cable & Wireless Communications
- Chemaide
- City & Guilds
- DHL
- Ernst & Young
- Frame Telecommunications
- Freight Traders
- Future Electronics
- GEAC Enterprise Solutions
- General Motors (Financing Division)
- General Practice Management Services
- Government Office for the East
- HBOS
- Heineken
- Hitachi Europe
- Hyperion Solutions
- IBAH (Euro Bio Pharm)
- IBM
- Informix Software
- Infospace
- Interforward
- iPlanet
- Kent County Council
- Kurt Salmon Associates
- Lawrence Industries
- Law South
- Learned Information Europe
- Lincolnshire NHS Trust
- Lloyds TSB Insurance
- Lotus Development Corporation
- Lucent Technologies
- Madge Networks
- Marcam Europe
- Martindale Hubbell (part of Reed Elsevier)
- Melroe Europe (part of Ingersoll Rand)
- Merck Pharmaceuticals
- Meto
- Metro Group
- Motorola
- National Australia Bank Group
- Nestle
- Oracle Corporation
- Parker Hannifin
- Polar Electronics
- Punch Retail
- QSE
- RCP Consultants
- Ready Mixed Concrete (RMC Group)
- Sanctuary Housing
- Scope
- Sequoia Technology
- Solid State Supplies
- Sun Microsystems - Ireland
- Sun Microsystems - UK
- Thanet District Council
- Trend Communications
- Unisys
- Wholesale Fittings
- Worldspan Services

15. SPECIALIST CONSULTANT AND TRAINING TEAM

The sales training / consulting team within hr TEAM are specialists in the sales area.

The selection criteria for the team means that we are able to deliver practical programmes, that acknowledge the realities of the world of selling, based on real life experience.

The trainers and consultants in this team have...

- ✓ A successful track record in selling
- ✓ Been in sales management positions
- ✓ An established career in training and consultancy

16. NEXT ACTIONS

We hope that you have found this Information Guide informative and interesting.

Next actions?

- ✓ If you would like more information on any specific topic, we can provide example materials
- ✓ We can arrange an initial telephone discussion for a general information exchange and to establish the common ground between the training needs in your sales team and our capabilities
- ✓ You may have a specific training project to discuss; in which case we can arrange a meeting. After a briefing we will respond with a considered proposal

Examples of materials for a range of the topics covered in this guide are available on request.

Please email :

Richard Moxham: richard.moxham@hrteam.co.uk

Lyn Killeen: lyn.killeen@hrteam.co.uk

Or call us on **01435 865 711**

17. OTHER HR TEAM SERVICES

Sales and sales management development is one of our core areas.

The other is Leadership, Management and Personal Development. An **Information Guide** is available on this aspect of our services and covers...

- Leadership and Management
- Developing Teams
- Managing Remote Teams
- Managing Outsource Suppliers
- Personal / Time Management
- Presentation Skills
- Project management
- Report Writing
- Recruitment and Selection
- Coaching
- Train-the-Trainer
- Performance Management

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THIS GUIDE IS ALSO AVAILABLE ON OUR WEBSITE