



## Sales Management Training Course

Courses in:  
Management  
Supervisory Management  
Project Management  
Communication  
Customer Care  
Sales  
Personal Development  
Human Resources  
Finance  
Administration

**Dublin (Head Office)** 01-8610700

**Cork** 021-4279511

**Belfast** 0845-3005207

**Galway** 091-500250

**Manchester (UK)** 0845-3005207

**Website:** [PDLcourses.ie](http://PDLcourses.ie)

**Email:** [info@PDLcourses.ie](mailto:info@PDLcourses.ie)

# Contents

<b>1 - Introduction</b>	<b>3</b>
<b>2 - The Sales Manager's Role</b>	<b>4</b>
<b>3 - Coaching Salespeople</b>	<b>10</b>
<b>4 - Time Management</b>	<b>14</b>
<b>5 - Decision Making</b>	<b>18</b>
<b>6 - Delegation</b>	<b>20</b>
<b>7 - Motivation</b>	<b>26</b>
<b>8 - Sales Meetings</b>	<b>32</b>
<b>9 - Appraisals</b>	<b>36</b>



# 1 - Introduction

Most Sales Managers would agree that being a Sales Manager involves using resources efficiently and effectively to achieve organisational goals. People are a primary resource, thus managing the performance of others is a key management responsibility. In talking to Sales Managers in all kinds of organisations, we have found that many problems and difficulties experienced by Sales Managers centre on people and the management of people.

Understanding how and why people behave in the way they do at work, and having the knowledge and ability to influence their performance enables Sales Managers to tackle their own jobs with confidence and commitment.

Given the types of pressure under which organisations are increasingly having to operate, it is not surprising to find a growing commitment by organisations to the development of people management skills at all levels.

When producing this manual, we have attempted to ensure that the training materials in it are of direct practical relevance and value to all those involved in the development of managerial and supervisory skills, irrespective of the type of organisation or business in which the Sales Manager is involved.



## 2 - The Sales Manager's Role

As a first step towards increasing overall effectiveness, Sales Managers must be aware of what managerial work involves. It is generally agreed that the purpose of management is to ensure that results are achieved. To understand what needs to be done to achieve results, Sales Managers must develop insights into what their work involves, the tasks they are expected to perform and the attitudes and skills which help them perform these tasks efficiently and effectively.

Recent studies in to the work of Sales Managers have shown that managerial behaviour is determined by the roles that Sales Managers perform. The essential difference between Sales Managers and their staff derives from the nature, variety and complexity of these roles.

Many organisations fail to define specific managerial roles. This creates uncertainty amongst Sales Managers as to:

- What they are required to do.
- The boundaries of their responsibilities.
- Relationships with others. Both inside and outside the organisation.
- The skills they need to develop to fulfil their roles effectively.

Even when roles have been formally defined, Sales Managers will benefit from periodically examining what their work entails as a basis for reviewing:

- What they actually do in relation to what they should be doing.
- The extent to which their roles are changing.
- The need for further training and development to enable them to perform present and emerging future roles effectively.

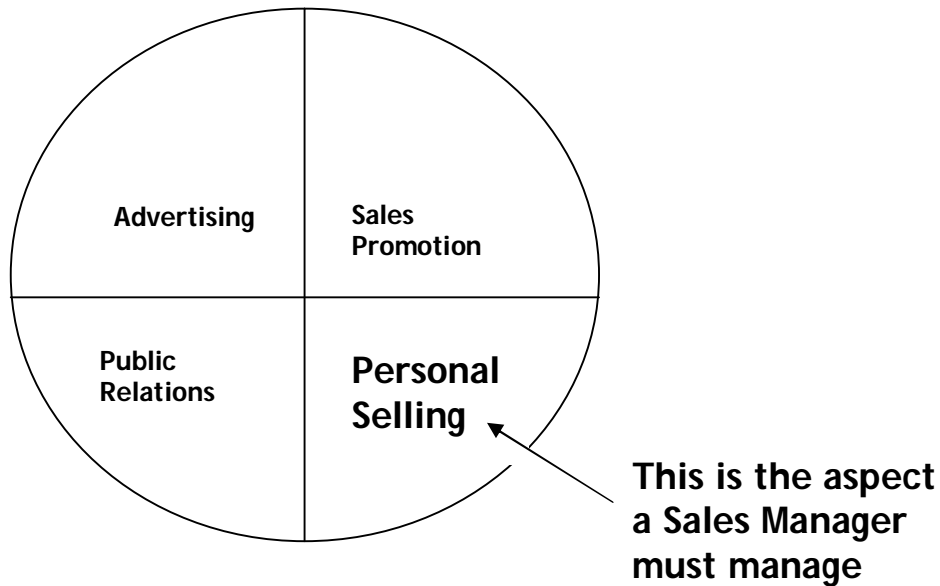
The Sales Manager's role includes:

- The group leader.
- The information sharer.
- The spokesman.
- The delegator.
- The performance appraiser.
- The liaison.
- The information seeker.
- The innovator.
- The negotiator.
- The trainer.



## The Sales Management Job

To market any product or service there are four aspects:

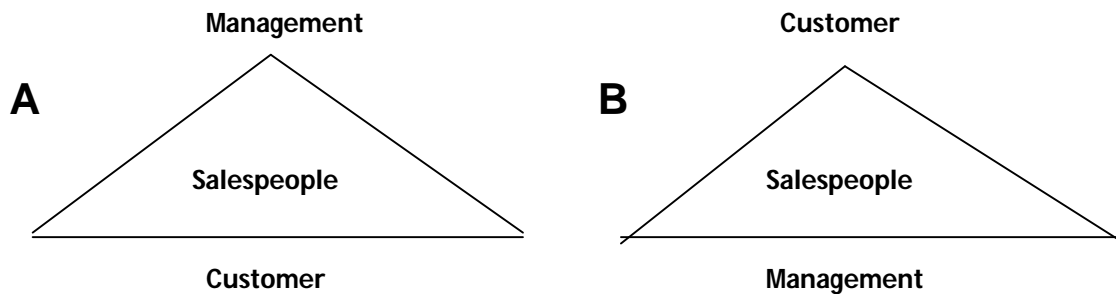


## Attributes for Successful Sales Management

- Know the business.
- Management skills:
  - Planning.
  - Organising.
  - Leadership.
  - Control.
- Attitude to:
  - Own ability.
  - The staff.
  - Senior management.



## The Sales Team Structure Test



*Answer: B. You work for them – they don't work for you!*

**Having staff problems again!**

**Believe it!!**

**There is no such thing as staff problems  
only  
management problems!!**

### Managing Sales Through Others

- Requires setting sales targets.
- Identifying activities which contribute to sales.
- Setting standards for those activities.

***Remember: Setting sales targets and leaving the Salespeople to get on with it is not managing, it's abdicating!!***



### 3 - Coaching Salespeople

Today's market is a highly competitive one and the ultimate success or failure of your company depends upon your salespeople securing sales from customers time and time again. Studies have shown that the majority of companies give the new inexperienced salespeople initial training and assume that the experienced people need no training at all. To maintain the edge over your competitor, you as a Sales Manager must ensure that your team of Salespeople sustain their sharpness of selling skills. One of the best ways to do this is by on the job coaching.

Coaching the sales team is one of the main tasks a Sales Manager must perform. He/she must use his competence and skills in selling to develop his/her sales team's selling techniques to achieve his overall objective: "Getting the Sales", through the efforts of his/her Salesforce.

Coaching is all about legislation; you must legislate to your sales team the standards for how the job should be done. This will be the only way you can measure where the salesperson is going wrong. There is no point telling the salespeople what to do if they cannot do it in the correct manner. You must tell them how to do it.

When coaching a salesperson, the Sales Manager should define a List of Standards that both he/she and the salesperson can work from. This list should include all the stages of a sale, from planning to closing the sales plus other areas relevant to the Salesperson's job. For example, the way he/she manages his/her territory, also his/her own personal appearance and attitude.

Once this List of Standards has been defined, the Sales Manager and his/her salesperson must work together to analyse each section in the list to determine areas requiring improvement. It may be a good idea to produce a type of appraisal form that both the Sales Manager and his/her staff can use out in the field to help recognise areas for improvement. This form should cover every standard listed and be designed in a manner that it rates the Salesperson on how well they achieve each standard. Remember that the standards must be measurable and not vague if you are to determine exactly what areas need improving.

***If you don't have standards for how the job should be done, you can't tell a Salesperson where he/she is going wrong!***



At the end of this section we have included a checklist with some of the standards that could be included in an appraisal form.

## Managing Sales Effort

To manage sales effort, Sales Managers should first identify what a Sales Team Member does and, secondly, set standards for what he/she should do.

List below areas for which you can set standards:

1. Calls or activities (e.g. number of calls per day, prospect calls, etc.)

_____	_____
_____	_____
_____	_____

2. Records (describe what records he/she should keep)

_____	_____
_____	_____
_____	_____

3. Making presentations (what are the stages of the sales call?)

_____	_____
_____	_____
_____	_____

4. Other areas (appearance, etc.)

_____	_____
_____	_____
_____	_____



## Setting Standards - A Checklist

### 1. Calls or Activities

- Calls per day
- Calls to customers
- Prospecting calls
- Service calls

### 2. Records

- Customer record card
- Customer cards - rated A, B, C
- Written call objectives
- Summary of call
- "Eyes and ears" report

### 3. Presentations

- Opening
- Questions
- Benefits (visual aids)
- Typical objections and how to answer
- Closing techniques to use
- Merchandising

### 4. Others

- Appearance
- Samples
- Sales promotion material
- Diary



## 4 - Time Management

To do their job effectively, Sales Managers need to call upon three major resources, all of which should be at their disposal:

- Their own skills and experience.
- The goodwill and trust of their staff.
- Time.

Of these resources, it can be said that time is the one which is generally the least considered and the worst managed.

Many Sales Managers complain that they do not have sufficient time. This may be because they have too much to do. It may be because their job is a highly fragmented one so that they have few opportunities to catch up with the tasks that require more thought. Or it may be because they do not organise their work properly.

One of the main aims of examining how you use your time is to enable you to gain periods of discretionary time during which you can do the things that are of importance to others. We can also build up chunks of time to enable us to work on tasks that need some thought and concentrated effort, for example, writing reports, analysing statistics, developing a plan, etc. Studies have revealed that many Sales Managers have very little discretionary time - although they still need to carry out jobs which demand such blocks of time. There is obviously plenty of scope for improvement.

Sales Managers seeking to use their time more effectively need to ask themselves questions such as:

- Am I doing things that really don't have to be done at all - by me or anyone else?
- Am I doing things that could be handled just as well by someone else?
- What do other people do to waste my time and what do I do that wastes their time?

Finally, all Sales Managers have a choice: either you can manage your time or you can let time manage you!



## Time Usage Questionnaire

All of us have opportunities to improve the usage of our personal time. We all experience time-related problems, in our jobs and in other aspects of our lives. To turn these problems into opportunities, however, we need to understand the reasons for the problems and we need to identify the consequences of having them. Only then can we develop realistic plans for improving time usage. This activity provides a means for working towards this goal.

Individually, complete the following questionnaire making sure that you answer all of the times. Place a tick in the appropriate column for each item.

Item	Strongly agree	Slightly agree	Slightly disagree	Strongly disagree
1. Other people always seem to come to me for advice.				
2. My work tends to pile up.				
3. I never seem to have time to myself.				
4. I spend too much time in meetings.				
5. I always seem to be trying to do too many things at the same time.				
6. I tend to put off unpleasant jobs.				
7. I tend to lose or mislay papers, memos, etc.				
8. I'm always writing letters, memos and reports.				
9. I have to start and stop jobs frequently.				
10. I find it difficult to say "No" to other people's requests.				



**Which do you prefer?**

**Working Your Plan**

<b>Planning</b>	<b>Doing</b>
-----------------	--------------

**OR**

**Reacting to the Day**

<b>Planning</b>	<b>Doing</b>	<b>Fire Fighting!</b>
-----------------	--------------	-----------------------



## 5 - Decision Making

In your role as a Sales Manager, you are expected to make decisions and get decisions implemented. The decision making style you use will not only affect the quality of the decision itself, but will also influence the effectiveness of its implementation.

Decision making styles range from autocratic through to participative. If you make a decision independently, seeking no contribution from your staff other than, perhaps asking for necessary information about the problem, you are adopting an autocratic style. If your people are included in the decision making process not merely to provide information about the problem but to contribute ideas and suggestions for alternative solutions, the style becomes consultative even though the decision you finally make may not reflect your people's influence. If you share the problem with your staff and jointly, as a group, make a decision which has the support of the whole group, you are adopting a participative decision making style.

No one style can be said to be appropriate for all situations in which decisions are made. There are, however, occasions when one style rather than any other is more likely to produce better quality decisions implemented with greater success.

When deciding how to decide, you need to be aware of the options and recognise the factors which indicate that one style is more appropriate than any others. You will therefore need to adopt a flexible approach to decision making by varying your style in response to the nature of the decision and the context in which it is made and ultimately implemented.

### Selecting the Right Decision Making Style

Deciding the correct decision making style is an essential but often neglected stage in the decision making process. The option you use will affect:

- The quantity and quality of information on which the decision will be based.
- The extent to which the decision is accepted by your staff.
- The degree of commitment displayed by your staff in implementing the decision.
- The speed with which the decision needs to be taken.



The process of selecting the most appropriate style is simplified if you ask yourself the following questions when considering which style to use:

- Is the quality of the decision reflected in a rational solution rather than considerations such as fairness?
- Do I have sufficient information to make a high quality decision?
- Do I know what information is needed and where it is located?
- Does effective implementation depend upon the decision being accepted by my staff?
- If I make the decision independently, is it likely to be accepted by my staff?
- Are the organisational goals of the decision shared by my staff?
- Is a preferred solution likely to cause conflict or disagreement amongst staff?



## 6 - Delegation

One of the most difficult tasks for Sales Managers, especially new ones, is learning to apportion the work among the people they manage. The difficulty is often due to just those personal qualities - job knowledge, competent personal performance, initiative, motivation and a reasonable degree of interpersonal skills - that make them successful employees in the first place and which ultimately led to their promotion. Those qualities might lead Sales Managers to believe they can do all the important work in their team by themselves.

The Sales Manager must recognise the role change from performing tasks to managing the performance of others. Concentration must now focus on planning, organising, motivating and controlling. This requires learning new skills and backing away from doing tasks that can be done by your staff. The Sales Manager must learn to delegate and do it well.

“Getting things done through other” is today accepted as an essential aspect of the process of management. Implicit in this definition is the notion of delegation. It is, however, surprising to find that many Sales Managers experience difficulty in seeing that improving their ability to delegate may actually offer a solution to, at least, some of their problems.

Delegation does not mean abdicating one’s responsibilities. Delegating effectively is, in fact, a prime responsibility of the Sales Manager. It can be achieved through the empowering and motivating of others to carry out tasks for which you are ultimately accountable, to a specified level of performance.

Some Sales Managers will claim that their jobs do not allow them to delegate. If this sounds like you, then ask yourself the questions listed below.



## Delegation Questionnaire

List the main tasks you are now doing or the tasks for which you are responsible:

- |          |           |
|----------|-----------|
| 1. _____ | 6. _____  |
| 2. _____ | 7. _____  |
| 3. _____ | 8. _____  |
| 4. _____ | 9. _____  |
| 5. _____ | 10. _____ |

Consider the following questions:

- Is there someone who can do any of the above tasks better than you? Are you really benefiting from the expertise of your staff?
- Is there someone who, while doing a task slightly different from you, or in slightly more time, can still achieve an acceptable level of performance?
- Is there someone who is paid less than you who can do the task satisfactorily, thus lowering the cost of the task performance?
- If you can not do the task until tomorrow, is there someone who can do it today?
- Is there someone who would benefit from doing the task in terms of their personal development?

Now list tasks to delegate

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_



## How to Assign Work

Delegating effectively is a two-way process involving both the Sales Manager who wishes to delegate and the staff member to whom the task is to be delegated.

Effective delegation is achieved when both parties come to an agreement on:

- The nature and scope of the task involved.
- The results to be achieved.
- The method to be used for assessing performance.
- The time scale involved.
- The nature and extent of the authority required for task completion.

Developing the ability to delegate effectively takes time and practise. The Sales Manager will benefit from giving some thought to the following points:

- **Find the right person:** in terms of existing and potential abilities, attitude, personality, etc.
- **Consult first:** allow your staff to be involved in deciding what is to be delegated.
- **Think ahead:** do not wait for a crisis to occur and then delegate. Try to delegate in advance.
- **Delegate whole tasks:** where possible, delegate a complete task to the staff member rather than just a small section of a task.
- **Specify expected outcomes:** make it clear what outcomes or results are expected from your staff.
- **Take your time:** especially if you have been under-delegating or are dealing with less experienced staff.
- **Delegate the good and bad:** if you are to delegate, you need to motivate so do not keep all the good interesting jobs.
- **Delegate, then trust:** once you have delegated a task, trust your staff. Yes, check the progress but let your staff decide when to ask for guidance.

### Always give:

- What
- Why
- When
- How

### Then:

- Clarify

### Now:

- Check progress



## Putting Theory into Practice

Identify a task from your own work situation which could be delegated. Using the chart below, develop a delegation plan for this particular task.

### Delegation Planning Sheet

1. Details of task (scope of responsibility, key areas in which results are to be accomplished, specific objectives, time scale, etc.)

2. Details person (existing abilities, level of interest and motivation, time availability, previous relevant training and experience, etc.)

3 Training needed (nature, method, cost, timing)

4. Authority needed

5. Feedback mechanisms (method, how often)

6. Your own responsibilities

Form into pairs. Briefly talk through your Delegation Planning Sheet with your partner who should give you feedback and ask questions which help you to clarify your thoughts etc. Make any necessary amendments to your planning sheet. Now repeat the process for your partner.



## 7 - Motivation

As Sales Managers, you have a key role to play in motivating your people. You have a responsibility to ensure that you get the most out of your staff and it is recognised that people work more effectively when they are motivated. Getting your staff to achieve the results you are aiming at requires you to:

- Understand how motivation works.
- Be aware of the ways in which your staff are motivated.
- Recognise the role you can play in motivating your staff.

Motivation is a measure of the extent to which people commit themselves to achieving goals which satisfy needs. But needs are complex and can be fulfilled in a variety of ways both within and outside the work environment. Maslow has classified people's needs in the form of a hierarchy. He suggests that each category applies to people in general and that as soon as a particular level of needs is satisfied, the next level in the hierarchy emerges. Consequently, needs are never static; they change over time and are conditioned by experience and expectations.

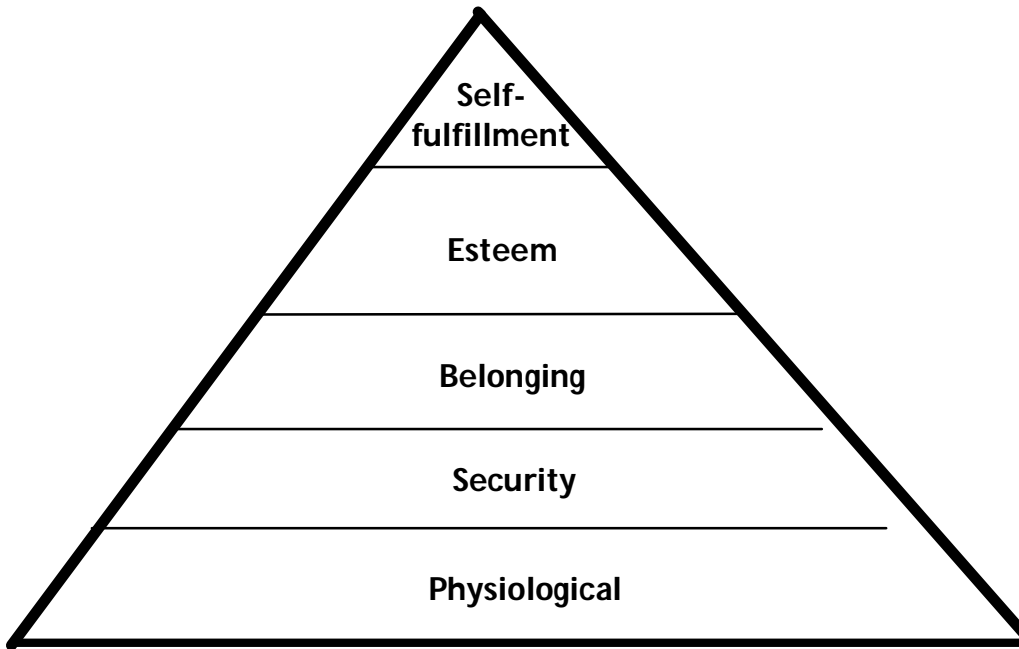
For example, basic physiological, safety and security needs are taken for granted by most people in our society, but when a person's job and livelihood are threatened, these needs become significant and the importance of higher level needs diminish.

The glib answer to the question "Why do you work?" is "I work for the money", but this is a very crude and incomplete explanation for why people work. Money is undeniably an important factor in influencing a person's motivation. Not only does it provide the means of satisfying many material needs but it is also a symbol of achievement and recognition. It is, however, wrong to overstate the role of money as a motivator, particularly when financial rewards are not directly associated with performance and achievement. In many situations money does get people to work but does not necessarily get people to work harder.

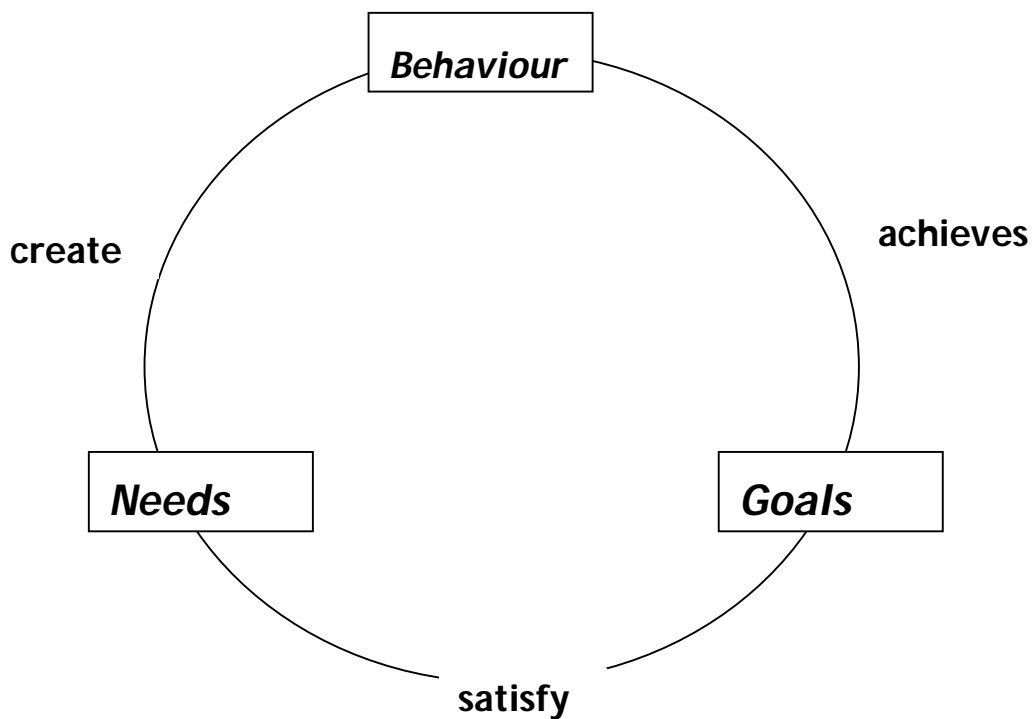
Work in itself is not a motivator. It is what people expect to get out of the work they do that motivates them to behave in particular ways. An effective manager is one who creates conditions which enable this people to reach their personal goals through achieving the goals of the organisation.



## Maslow's Hierarchy of Needs



## The Cycle of Motivation



## Motivation - The Role of the Manager

The purpose of these tasks is to make you aware of the role you play in motivating your team. Section A consists of a questionnaire which you are required to complete individually. This provides a basis for section B which involves you working with a colleague, helping each other to explore ways in which you and others could motivate your team more effectively.

### Section A

The following questions relate to some of the factors which contribute towards getting personal satisfaction from work. Think carefully about each question and place a tick in the appropriate box.

#### Do your team:

	Yes	No	Don't know
1. Understand the purpose of the work they are doing?	[ ]	[ ]	[ ]
2. Know the criteria which will be used to measure their performance?	[ ]	[ ]	[ ]
3. Have an influence over the planning and organisation of their work? Do they have a real input in setting their own targets?	[ ]	[ ]	[ ]
4. Receive information about changes and developments in the Organisation's policy and operations?	[ ]	[ ]	[ ]

#### Do your team:

5. Have opportunities to feedback their feelings regarding their work or relationship within the Organisation?	[ ]	[ ]	[ ]
6. Receive feedback on their performance?	[ ]	[ ]	[ ]
7. Receive encouragement in the form of praise, recognition, etc?	[ ]	[ ]	[ ]



## Section B

Join with a colleague and, using your answers to section A as a guide, discuss the following question. Share your ideas and help each other overcome difficulties.

What, if anything, could you do to make a more substantial contribution to any of the items listed in section A?

---

---

---

---

---

---

---

---

---

---



## The X/Y Scale

Read each item carefully and then put a tick in one of the columns to indicate what you would do in your own real work situation.

<b>As a Manager I would:</b>	<b>Make a great effort to do this</b>	<b>Tend to do this</b>	<b>Tend to avoid doing this</b>	<b>Really try to avoid this</b>
1. Closely supervise my team in order to get better work from them.				
2. Check with team members daily to see if they need any help.				
3. Set the goals and objectives for team members.				
4. Encourage team members to set their own goals and objectives.				
5. Make sure that the team's work is planned out for them.				
6. Outline and discuss the objectives and encourage team members to plan how to meet them.				
7. Push my team to meet my schedules.				
8. Set up controls to ensure that the team are getting the job done. Step in as soon as the reports indicate that the job is slipping.				



## 8 - Sales Meetings

Sales meetings are a common cause of frustration in many organisations. Time spent in meetings is often seen as time which could be spent *doing* rather than *talking* about doing.

Your role in sales meetings will vary, depending on whether you have organised the sales meeting and are acting as chairperson or convenor, or whether you are attending sales meetings organised by others.

In either case, however, you have a responsibility to ensure that the sales meeting is successful and does not rob you and your colleagues of valuable time.

Sales meetings are often criticised for:

- Having no real purpose.
- Making straightforward issues complicated.
- Lasting too long.
- Providing a platform for the talkative.
- Delaying decisions and actions.

But these criticisms need not apply to all sales meetings. Sales meetings can be successful if:

- The purpose of the meeting is made clear beforehand.
- Participants come to the sales meeting prepared.
- The agenda items and time budgeted for each item are not seen as a 'moveable feast'.
- Contributions are limited to those which are useful and relevant.
- Attendance is restricted to people affected by the issues being discussed.
- Where appropriate, decisions are made and actions initiated.

Sales meetings can, therefore, be an effective means of:

- Communicating to a group.
- Improving the quality of decisions.
- Providing a forum for structured discussion.
- Contribution towards team-building.



## How to make sales meetings work

These points will help you make your own sales meetings more effective.

### ***Before the sales meeting:***

1. Decide whether the sales meeting is necessary:
  - Could the objectives be achieved more effectively through another process?
2. Establish the purpose of the meeting:
  - What are we trying to achieve?
  - What decisions need to be made?
  - What actions need to be initiated?
3. Prepare an agenda:
  - Include only those items relevant to the purpose of the sales meeting.
  - Prioritise items in order of importance.
  - Group together related items.
  - Indicate time allowed for each item.
4. Collect all available information relevant to agenda items. If lengthy, summarise into briefing notes outlining salient points.
5. Circulate agenda and supporting documentation well in advance of the meeting.
6. Restrict attendance to those people affected by the issues to be discussed.
7. Just before the meeting, check for new information which, if being presented to the meeting, should be simplified and summarised.

### **During the sales meeting:**

1. State the purpose of the sales meeting.
2. Check attendance and make a note of those present.



3. Set the scene for each new item on the agenda and then open discussion by inviting specific contributions from members.
4. Let everyone who has a pertinent contribution have his/her say.
5. Control the discussion. Don't be afraid to bring it into line if it starts to drift into excessive detail or irrelevancies.
6. If a discussion becomes complex and a wide variety of views are being expressed, summarise to review your own understanding and that of others.
7. Stick to the budget.
8. At the end of each items discussion, summarise any decisions made and conclusions reached.
9. Summarise what has been achieved at the end of the sales meeting. If further action is required specify who is to do what and agree on a deadline.

### **After the sales meeting:**

1. Circulate minutes to those who attended, and those who did not attend the sales meeting. Minutes should be an accurate record of the proceedings. Decisions made during the sales meeting should be highlighted, with the names of people responsible for action and the time-scale, shown clearly against each decision. State the date and time of the next sales meeting.
2. Monitor and review the progress of action arising from the sales meeting.



## 9 - Appraisals

Studies have shown that the appraisal meeting can be one of the most effective ways in which to keep staff motivated, interested and committed to the organisation and their job. It is also one of the primary instruments of two-way communication.

To achieve these desirable results, the appraisal meeting must be handled in the correct manner of the result could be one of frustration, alienation and confusion.

Unfortunately, most appraisal meetings are conducted by busy Sales Managers who are not trained in personnel skills and are inundated with many urgent problems. Worst of all, these Sales Managers do not treat the appraisal meeting as an important event and therefore the time spent in planning and preparation is minimal. So by the end of the meeting the Sales Manager believes the meeting went quite well without realising that his/her staff member has just walked out in a state of confusion wondering what it was all in aid of.

The appraisal meeting must not be confused with salary reviews or be used as a discipline tool. Too often the appraisal meeting is used to tell staff where they are going wrong and to tell them that, "Sorry I can't give you a raise this time round". This type of meeting defeats the whole purpose of the appraisal meeting. Remember, this meeting is to motivate and encourage the staff member to improve on their weaknesses and to congratulate them on their strengths. The Sales Manager needs to have a clear understanding of both their own and the staff member's objectives for the meeting. The last thing you want your staff to say is "*Not another appraisal!*"



## The Three Steps to Appraisal Meetings

When giving appraisal meetings, the Sales Manager must:

- **Prepare**
- **Interview**
- **Follow-up**

### Step One - Preparation

- Set objectives - remember it is a performance improvement and motivation interview.
- Give plenty of notice - the staff member needs to prepare as well.
- Prepare the facts - have all the information you need in front of you and prepare what you want to say.
- No interruptions - give this meeting the respect it deserves so make sure there will be no interruptions during the meeting.

### Step Two - Interview

- Start with strengths - get the person in the right frame of mind so you can then discuss their weaknesses.
- Lead to self-evaluation - most people do not need to be told where they are going wrong. It is much better for both of you if they admit to weaknesses without being told.
- Identify and agree on areas for improvement - use questions to help identify these areas such as:
  - How do you see your future here?
  - What are your weak points?
  - What difficulties have you had in the last 6 months?
- Always end on a positive note.
- Agree on an action plan.
- Set a review date.

### Step Three - Follow-up

- This is essential if you want to be seen as taking the meeting seriously and if you want the person to really improve on their weaknesses.

By doing all of this, it will show your team that not only are you professional, you also care about your staff and their problems and that you care enough to want to help them improve in every way possible.

