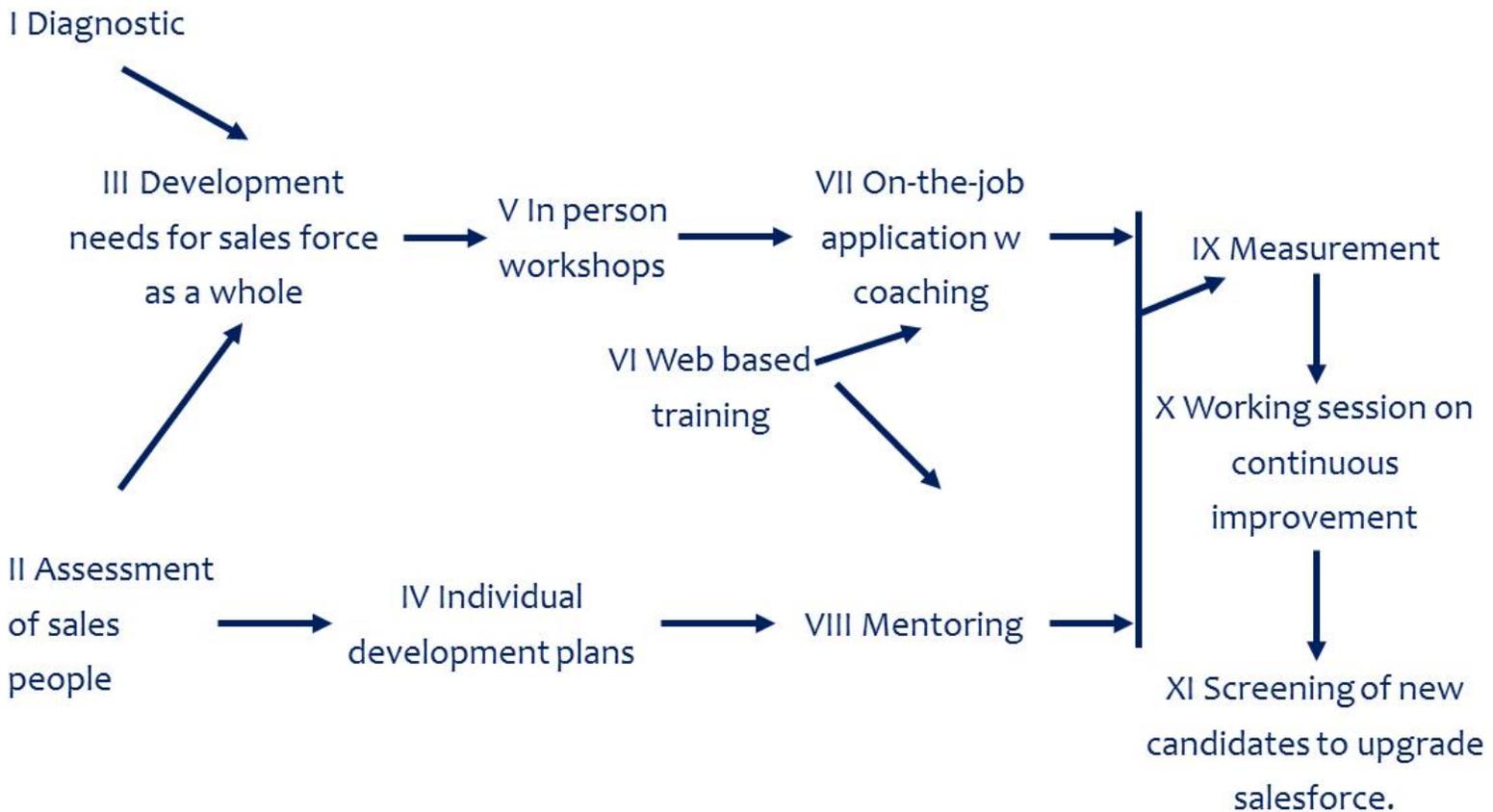


Center for Business and Industrial Marketing

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CBIM’s “Curriculum in Professional Selling” is a flexible, matrixed suite of courses that can be customized to address the broad variety of selling situations and challenges faced by B2B sales forces.



The following pages describe the 10 steps in grater detail.

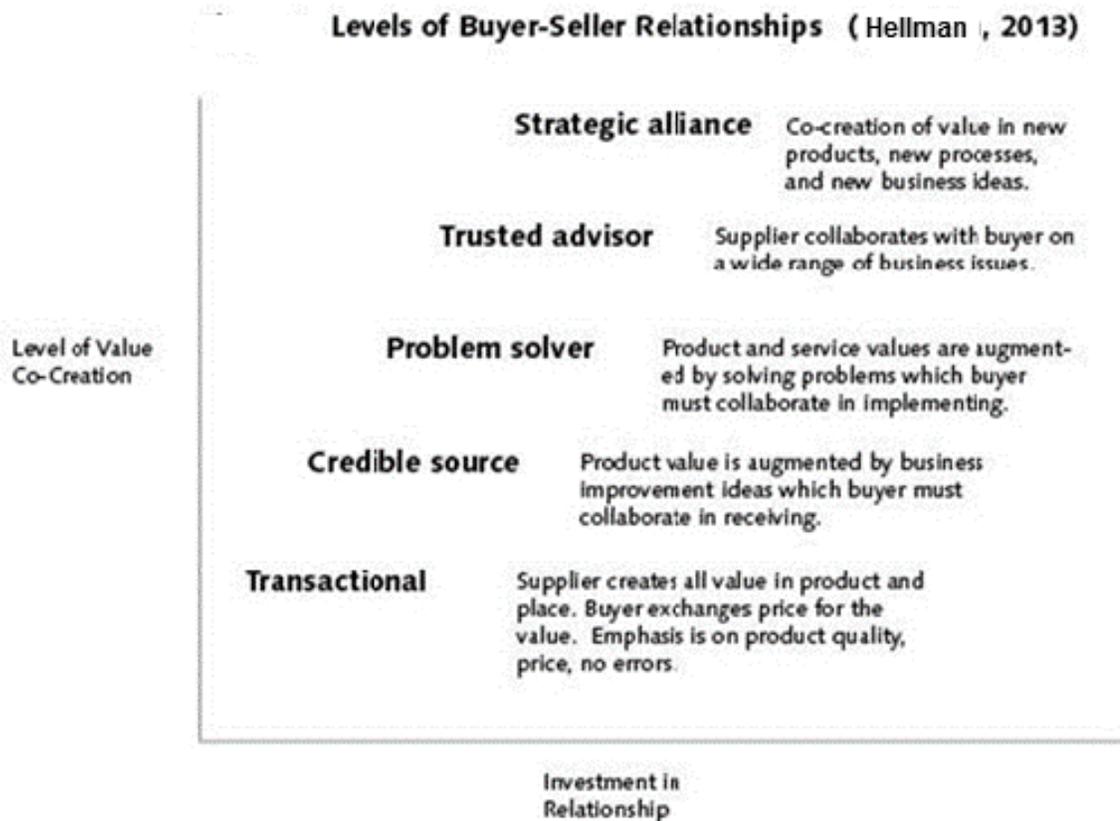
I Diagnostic

What aspects of sales are working? What issues remain?

Interview senior management, sales management, marketing.

Conduct research if necessary.

Assess strategies by sales role, division, or product:



Output:

- Definition of the DNA of your ideal sales person.
- Definitions of Strategy, Systems and Support
- Strengths to build on and issues to address

II Assessment of sales people

Individual assessment of sales people's strengths and development opportunities

- Customize assessment tools based on ideal sales person DNA and strategic context.
 - Communicate with sales people and sales management to assure cooperation.
 - Manage the administration of the on-line assessment tools.
 - Analyze results:
 - Conduct pipeline analysis.
 - Identify common strengths to build on.
 - Identify common issues to address.
 - Document both group and individual development plans.
 - Document sales management development opportunities.
 - Meet with management to review findings and recommendations.
-
- The following pages provide sample analyses.

Sample analyses from individual sales people assessments.

The CBIM assessments evaluate each sales person on eight sets of sales skills that together comprised the sales job. These seven sets of skills are : Hunter skills; Closer skills' Qualifier skills; Farmer skills; Account manager skills; Intellectual skills; and Ambassador skill.

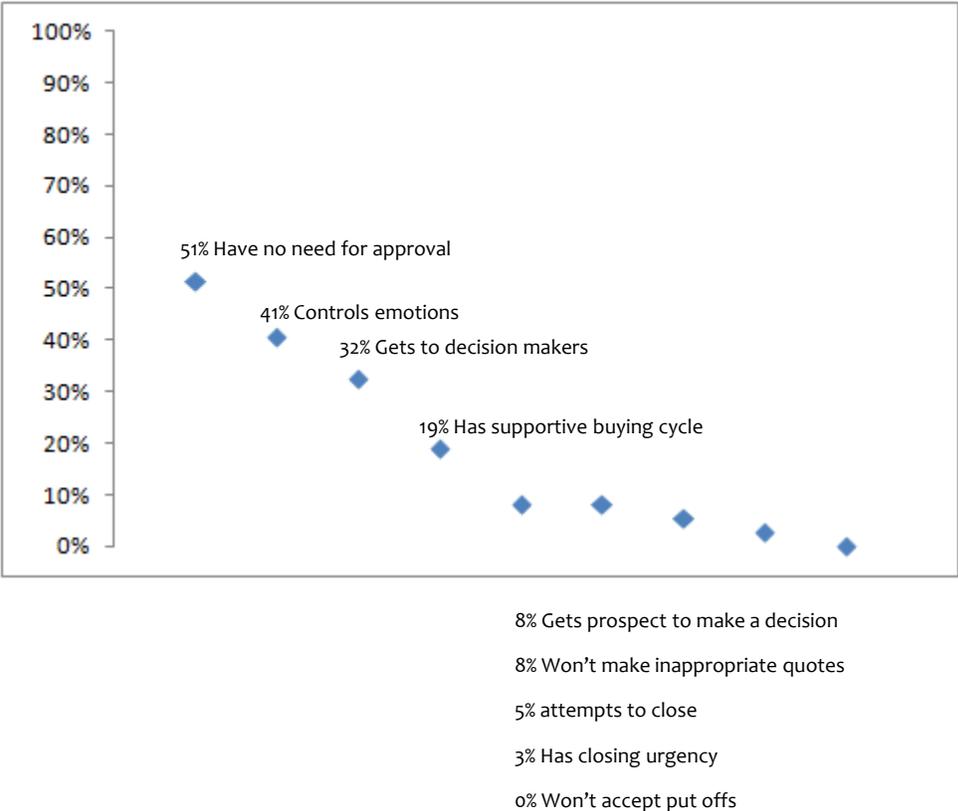
The graphic below illustrates the kind of insight about the organization as a whole that the summarization of assessments can yield.



Sample analysis: Plot of % Sales People practicing each closer skill

This chart illustrates a summary of how the sales force as a whole scored on the nine components of the closer skill set.

The developmental way of looking at this pair of findings is that the sales team has a dual opportunity—the sales people can develop closing urgency and the sales management can hold them accountable for doing it.



Sample Analysis: Training needs shared by whole sales force

The CBIM sales assessment overview presents a training curriculum for your sales force.

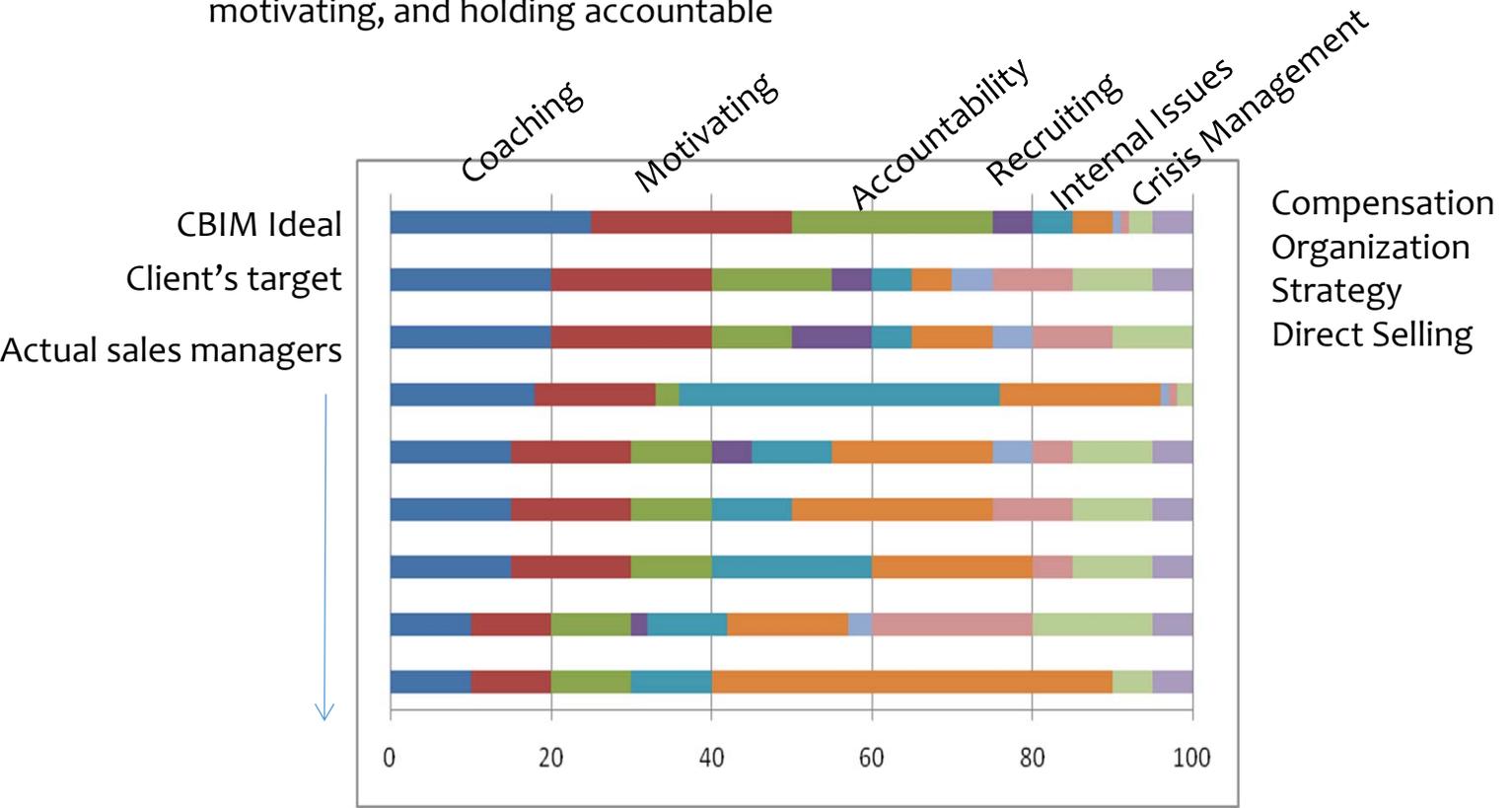
Training Area	Core Competency	Training module	% Group needing this training
Mastery of a more powerful selling system	Discovering why prospects buy	Selling process	100%
Getting prospects to agree to make a decision	Gets commitments and decisions	Selling process	100%
Improve selling skills	Discovering why prospects buy	Selling process	100%
Improve productivity	Consistent effective prospecting	Prospecting	98%
Better closing skills and execution	Gets commitments and decisions	Closing the deal	92%
Fewer inappropriate time wasting decisions	Effective listening and questioning	Hot buttons	92%
Getting stronger appointments	Reaches decision maker	Hot buttons	92%
Eliminate put-offs	Doesn't need approval	Objections	85%
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Sample analysis of Sales management

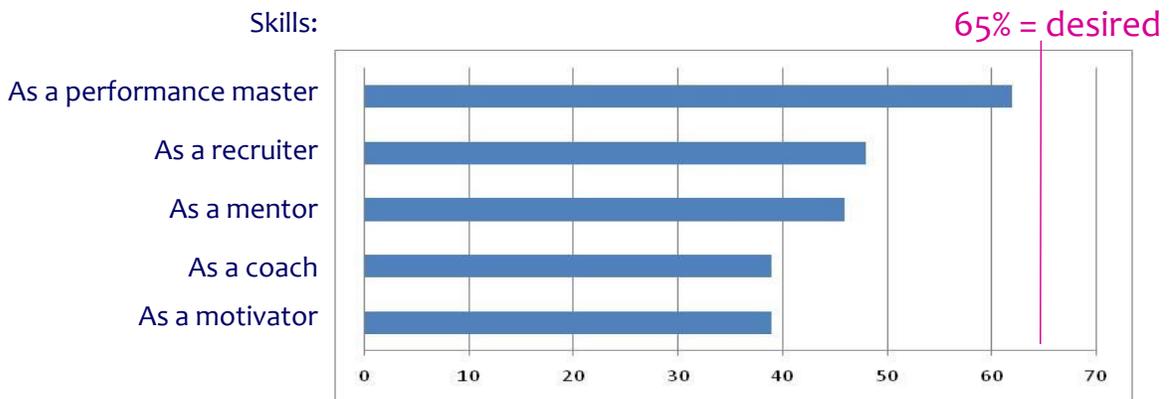
CBIM research shows that best practice is for sales management to spend 75% of its time on three performance enhancing activities:

Coaching	25%
Motivating	25%
Holding their people accountable	25%

Sales management can almost always spend more time coaching, motivating, and holding accountable

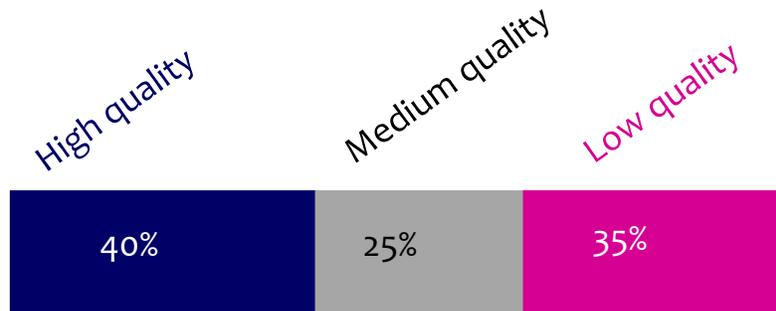


Sales management capabilities:



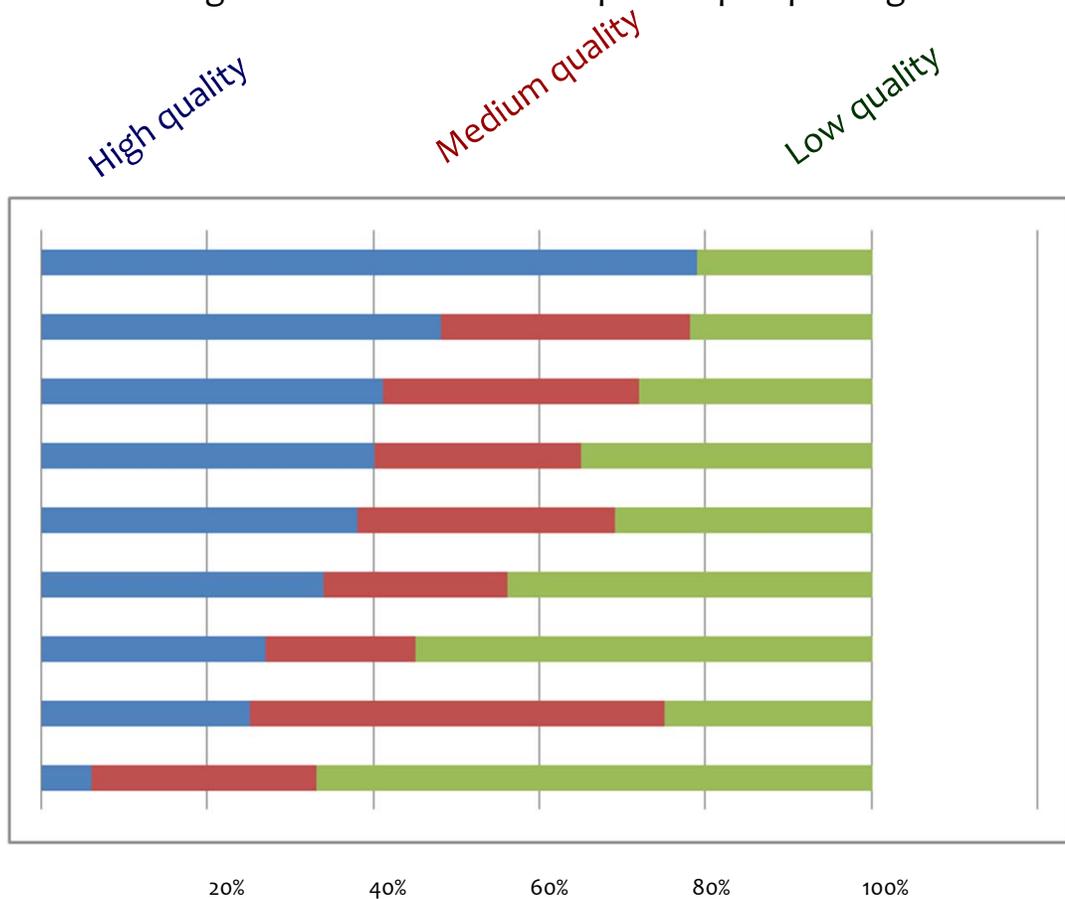
Sample analysis : Pipeline

Sales people are asked to evaluate a sample of their prospects on 19 specific dimensions.

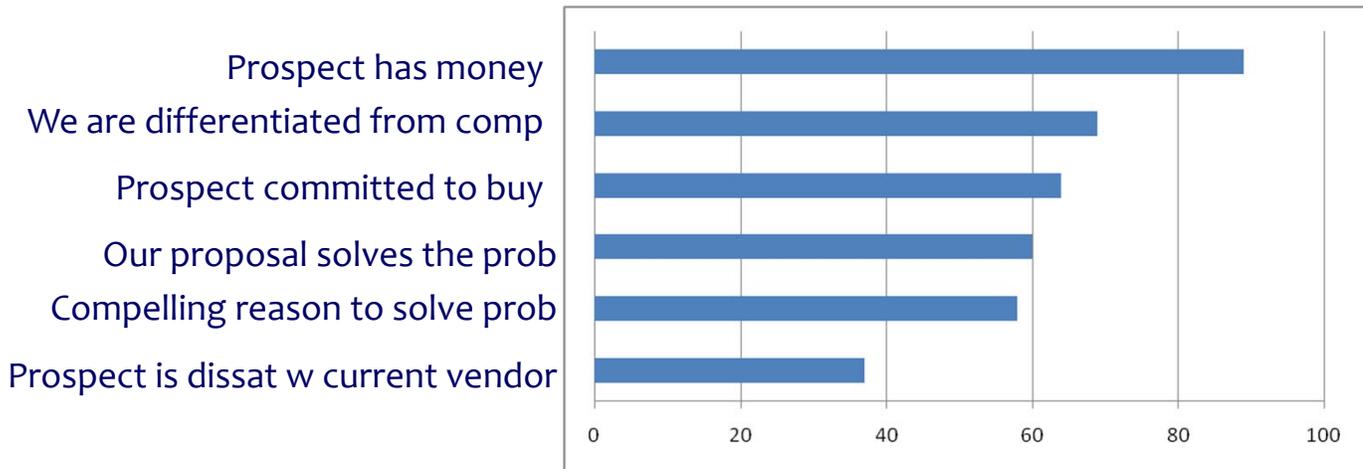


The client's pipeline quality varies across regions

The chart below breaks the overall pipeline down by sales region. Note that even the best region can benefit from improved prospecting.



Of the 19 questions about pipeline quality, six have the highest impact for this particular client



The complete list of 19 questions about pipeline quality,:

- Quoting decision maker
- Decision upon quoting
- Compelling reason to solve their problem
- Will be profitable
- Prospect is credit worthy
- Developed strong relationship
- Existing clients not impacted
- Differentiated ourselves from the competition
- Compelling reason to buy from us
- Commitment to buy
- Funding exists
- Client knows price range
- Competitive issues handled
- Indicated preference toward us
- Dissatisfied with incumbent vendor
- Decision within 30 days
- Delivery timeframe is appropriate
- No need for competitive quotes
- We have a solution

Economic value of addressing the developmental coaching issues

Based on the data collected from the sales people and sales managers in the assessment process, we calculate the economic impact you can achieve by addressing your key developmental opportunities.

Developmental opportunity area	Potential increase	
	In pipeline	In revenues
Ineffective prospecting	\$5,200,000	
Ineffective qualifying	\$3,875,000	
Ineffective selling system		\$6,022,000
Lack of accountability		\$5,784,000
Discounting		\$4,252,000
Need for approval and buy cycle		\$3,000,000
Total impact	\$9,075,000	\$19,058,000

IV Individual development plans

These assessments will suggest development opportunities for each sales person and determine the areas and topics where training and on-going coaching will have the greatest impact. For each person.

The assessments include evaluation of qualities required to perform the sales task including: desire, commitment, responsibility, need for approval, talking money, coping with rejection, and outlook. They also evaluate your people's skills by measuring each of the component behaviors listed below:

Hunter skills

- Prospects consistently
- Gets past gatekeepers
- Gets to decision makers
- Gets to decision makers
- Gets appointments when prospecting
- Receives plenty of introductions
- Will prospect
- Has no need for approval
- Recovers from rejection

Closer skills

- Gets prospect to agree to make a decision
- Won't make inappropriate quotes
- Gets to decision makers
- Attempts to close
- Has closing urgency
- Won't accept put offs
- Has supportive buy cycle
- Has no need for approval
- Controls emotions

Qualifier skills

- Uncovers actual budget
- Gets to decision makers
- Learns why prospects buy
- Learns how prospects buy
- Does not assume
- Comfortable talking about money
- Has high money tolerance
- Has no need for approval
- Controls emotions
- Has supportive record collection

Farmer skills

- Has closing urgency
- Attempts to close
- Controls emotions
- Won't accept put offs
- Has supportive buy cycle
- Has difficulty recovering from rejection
- Has need for approval
- Won't prospect

Account manager skills

- Develops bonding and rapport
- Gets to decision makers
- Uncovers actual budget
- Knows how to handle people
- Effective time management
- Lacks closing urgency
- Has need for approval
- Won't prospect
- Believes—"I should be their friend"
- Inappropriate follow up calls

Intellectual skills

- Attempts to close
- Uncovers budget
- Gets to decision makers
- Learns why prospects buy
- Learns how prospects buy
- Has at least 10 skills
- Has need for approval
- Has non-supportive buy cycle
- Has self limiting records
- Has money issues
- Has difficulty controlling emotions

Ambassador skills

- Develops bonding and rapport
- Gets referrals and introductions
- Knows how to handle people
- Enjoys selling
- Inappropriate follow up calls
- Wasting time—selling system
- Believes—"I should be their friend"
- Skills limited to first three of this list

Timid sales skills

- Has low self esteem
- Has need for approval
- Has difficulty recovering from rejection
- Uncomfortable talking about money
- Has outlook problem
- Is not money motivated

V In person workshops

Workshops targeted at biggest performance and strategic gaps:

Sales force workshops

Sales management workshops

Follow up application on the job with coaching support

Sales Foundations: Value Selling, Buyer Behavior and General Sales Skills

—two or three day formats:

- Omni Automation Case—B2B sales in a complex buying environment
- Relationship Assessment Questionnaire
- Opportunity Assessment tool
- Quantitative Value propositions
- Other training targeted at development opportunities
 - Qualifying: If you are going to hear “No” eventually, the less time you waste the better.
 - Conceptual (“ Challenger”) selling
 - Relationship building
 - Money
 - Need for approval
 - Negotiation
 - Prospecting
 - Relationship mapping job tool
 - Establishing and working an efficient sales process

Sales management workshops—one and two day formats:

- Strategy and process gaps
- Sales management best practices to adopt, e.g., holding sales people accountable.
- How to coach sales people

V In person workshops (continued)

C-Level Sales Management

- Team selling
- Managing relationships with customers
- “Getting the ear” of senior/executive-level management
- Having something significant to say to them.
- “Best practices”
- Customer relationship management (CRM)
- C-level selling techniques including the principles and best practices of “insight” selling will be practiced.

Accelerating Sales With and Through Distributors

This course provides both the strategic and practical implementation foundational knowledge required of manufacturer sales organizations to accelerate sales with and through distribution.

Sample of topics:

- Forces leading to adoption of, and shaping channel strategies
- The customer’s perspective
- The manufacturer’s point-of-view
- Selection of direct selling versus working with distributors
- Differences in distribution channels and their strategies
- Practical skills required to sell with and through distributors
- Cases include understanding channel economics’ impact on strategy, dealing with channel conflict, and evolution of channel structures.

V In person workshops (continued)

Key Account and Customer Relationship Management

Building quality key account strategies is the heart of successful business marketing programs.

The role of the sales force in establishing and nurturing these relationships is vital. Topics include:

- Latest thinking in key account and customer relationship strategy
- Impact of the sales environment
- Managing the long selling cycles
- Complex propositions
- Organizational options and implications
- Relationship mapping
- Understanding buying processes
- Economics of key account management
- Metrics and scorecard based meetings

Hiring and Developing A-level Sales People

Today's B2B sales strategies range from transactional selling to problem solving to relationship building to conceptual selling. Each strategy calls for a different set of skills and qualities.

- So the first step in this workshop is for participants to identify the strategy driven qualities their sales force needs.
- With the profile definition for your ideal sales person, the next steps covered in the workshop are how to source candidates, obtain objective information about candidates and candle this information against your profile to identify candidates with the highest probability of success.
- Given the short list of candidates, your world class recruiting process shifts to a series of interviews and the workshop provides best practices and techniques.
- And recruiting is not complete until a thorough on-boarding process is defined and implemented to make sure the best candidates succeed.

Attendees will learn the principles, techniques, and best practices to develop their world-class recruiting process—from strategy-driven profile to on-boarding.

VI Web Based Training

Each web-based course is available in two formats:

- **Independent study.** This is the classic online approach, where learners work through the material on their own. Course work is not graded, nor are minimum quiz scores set.
- **Application Coaching and Certification.** A blended learning format that augments the online course with minimum quiz scores; three, hour-long webinars; detailed homework review, feedback, pass/fail grading; and certification for successful completion.

Relationship mapping—Key to Closing the Big Deal This

course supports the participant's creation of a relationship map for an important account where they are working to close a big deal. After samples and best practices are presented, participants begin work on a relationship map for their chosen account and deal. Optional follow up discussion focuses on uncovering opportunities to win the deal and expand and develop the relationship.

Optimizing Investments in Key Accounts: This course includes having participants complete the Relationship Assessment Questionnaire for one of their key accounts and develop sales activities to use to optimize investment in the account. Optional follow up discussion focuses on actions the participant can take to balance investment in the account with what the account would like as well as with the potential the account presents.

Forecasting: Basic & Intermediate: A critical aspect of understanding your company's relationship with its key accounts is to identify patterns of demand, such as trend and seasonality. This course enables the participant to set expectations for "business as usual" sales performance and measure the effects of his or her sales activities. Optional follow up discussion provides feedback and guidance on how to improve forecasts as well as discussion of their implications and the opportunities they uncover.

VI Web based training (continued)

Building Business with a Relationship Scorecard: One of the main tools in key account management is the relationship scorecard. It tracks progress and promises kept, and lays the groundwork for discussing ways to expand the relationship. Often the scorecard serves as the basis for a meeting with the customer in which accomplishments and historical performance is reviewed and opportunities for new business are uncovered and planned. This module includes participants planning both the scorecard and the business development meeting for one of their key accounts. Optional follow up focuses on application exercises that are produced during and after completing these courses and their review by and discussions with client executive management as well as expert consultants.

Quantitative Value Propositions: Learners master the discipline of creating value word equations to enhance their sales presentations. Participants can begin immediately to quantify the ways they talk about their offerings in selling conversations. Optional follow up provides participants with feedback from expert consultants on their application of the principles and best practices of the course.

Growing the Core Business: A web-based workshop led by Dr. Jagdish Sheth Dr. Sheth demonstrates that “the core business is always the best business.” He presents two original analytical models and seven strategies you can apply to your business to grow it profitably. The principles and strategies are illustrated with world-class company examples. Optional feedback from our expert consultants focus on the application exercises that are produced during and after completing these courses.

VI Web based training (continued)

Set Better Sales Quotas: Ninety percent of sales forces use quotas, but 80% of them are dissatisfied. First quotas must be aligned with your strategies. They must direct sales activities, motivate the behaviors your strategy needs, and penetrate your target market, producing revenues at needed margins. This course is offered in two forms, one for the sales people who need to have input into quotas and then meet them once they are set, and the second for sales executives, HR professionals, and general managers who need to lead the sales quota setting process.

Set Better Sales Quotas—The Basics—This course provides the basic principles and best practices that sales people need to have input into and then meet sales quotas. As for all of our courses, this one is offered either as in a self-study format or with optional feedback on course assignments by our expert consultant.

Set Better Sales Quotas—For Managers: This course outlines our proven five step quota setting process that uses facts and analysis to produce accurate and effective, strategy-driven quotas. It also provides guidance on how to communicate with sales people, both to obtain their input and then explain the strategy-driven quotas that are eventually set. Again, the course is offered in a self-study format as well as with optional feedback from our expert consultants.

VI Web based training (continued)

Pricing

For individual or group pricing, please call:

Ralph Oliva roliva@psu.edu 814 863 2782

Helene Mathern hcm11@psu.edu 215 348 9999

Wes Johnston wesleyj@gsu.edu 404/953-1164or

Karl Hellman khellman@Resultrek.com 678 793 7343

VIII Mentoring

As little as 3 hours of mentoring a month increases sales by 15%.

Half day workshop for sale managers involving case studies and role playing

On the job application: Involve mentor role in the coaching process of sales people.

Use individual development plans as a basis for an on-going mentoring program

IX Follow up measurement of progress

Web based assessment measures progress through training and coaching.

Coaching process produces “ best practice” examples from your own sales team.

Use series of telephone conferences to feature best practice examples and sales people.

Sales force survey on what worked what needs improvement.

X Working session on continuous improvement

Learn from measurement surveys and best practice examples about progress to build on and next progressive steps to take.

XI Screening of new candidates to upgrade salesforce.

Part of the recommended continuous improvement plan is a program to screen new hire candidates to identify those who will be able to execute the company's strategy. This program kicks off with a workshop for those involved in screening and hiring decisions and includes the following steps:

- Review and confirm the profile of their ideal sales person based on their sales strategy
- Source candidates who fit the profile
- Obtain objective information about candidates
- Use objective information to screen candidates and develop a short list
- Conduct interviews using best practices and techniques
- Design and implement a thorough on-boarding process is defined and implemented to make sure the best candidates succeed.
- Develop and track metrics to continuously improve the recruiting process

Workshop attendees learn the principles, techniques, and best practices to develop their world-class recruiting process—from strategy-driven profile to on-boarding.

Sample assignments

This section describes nine sample assignments.

The following table presents the courses and programs each assignment involved.

The next pages describe each assignment in greater detail.

	Fundamentals	Key Accounts	Sales Management	Hiring A-Level	Coaching	Event ROI
Packaging Company		✓			✓	
Specialty Chemical Company—1 (Also used the web-based training)	✓	✓	✓	✓	✓	
Specialty Paper manufacturer	✓	✓	✓	✓	✓	
Specialty Chemical Company—2 (Also used the web-based training)	✓	✓		✓		
Global pump manufacturer		✓				
Industrial Packaging Company	✓	✓		✓		
Quick Service Restaurant						✓
B2B Supplies Company						✓
Telecommunications	✓	✓	✓	✓		

Sample assignment: Packaging Company

Situation:

Largest account was purchased by a larger firm with opposite strategy.
Threat was that all their business would be lost.

Approach:

Key account training.
Interviews of five key account customer people.
Identified strategic and tactical actions.

Result:

Doubled business.
Became “vendor of the year” for the key account and its new owner.

Sample assignment: Specialty Chemical Company 1

Situation:

Sales force was not executing their new strategies.

Approach:

Training and 12 weeks of application and coaching
Hiring A-level Sales people program and screening.

Result:

Post program measurements documented significant progress.
Best practice examples were created in the coaching program.
Sales force was transformed to be able to execute the strategy.

Sample assignment: Specialty paper manufacturer

Situation:

Sales force was unable to execute the new strategy.

Approach:

Key account training.

Sales Management Training

Identified strategic and tactical actions.

Result:

Shifted volume from low margin to high margin sales

Increased share of targeted strategic markets.

Sample assignment: Specialty Chemical Company 2

Situation:

Needed to build a new sales force for a differentiated B2B business.

Approach:

Training and 8 weeks of application and coaching

Hiring A-level Sales people program and screening.

Web-based courses to reinforce new behaviors.

Result:

Post program measurements documented significant progress.

Best practice examples were created in the coaching program.

New sales force was built and is executing the strategy.

Sample assignment: Telecommunication Company

Situation:

Sales force was unable to execute the new strategy.

Approach:

Diagnostic

Assessments

Identified strategic and tactical actions.

In person Workshop

Result:

Transformed sales force

Dominated a key vertical market

Sample assignment: Global pump manufacturer

Situation:

Key account program was unsuccessful in growing the largest account.

Approach:

In person workshop.

Applied the key account investment framework.

Result:

Doubled revenues from largest account.

Reduced (focused) cost to serve

Sample assignment: Quick Service Restaurant Chain

Situation:

Millions were being spent on event marketing (e.g., sponsoring Bowl Football Games)

Approach:

Implemented an innovative measurement framework

Result:

Demonstrated significant financial return on investment

Sample assignment: B2B Supplies Manufacturer

Situation:

Millions were being spent on event marketing (e.g., sponsoring Bowl Football Games)

Approach:

Implemented an innovative measurement framework

Result:

Demonstrated significant financial return on investment

Sample assignment: Industrial Packaging Company

Situation:

The sales force met increasingly “professional purchasing” approaches in their key customers that made their traditional methods ineffective.

Approach:

In person workshop.

Applied the relationship mapping framework.

Created ideal sales person profile for the new environment.

Result:

Transformed sales force.

Return to growth.

Sample assignment: Global pump manufacturer

Situation:

Key account program was unsuccessful in growing the largest account.

Approach:

In person workshop.

Applied the key account investment framework.

Result:

Doubled revenues from largest account.

Reduced (focused) cost to serve