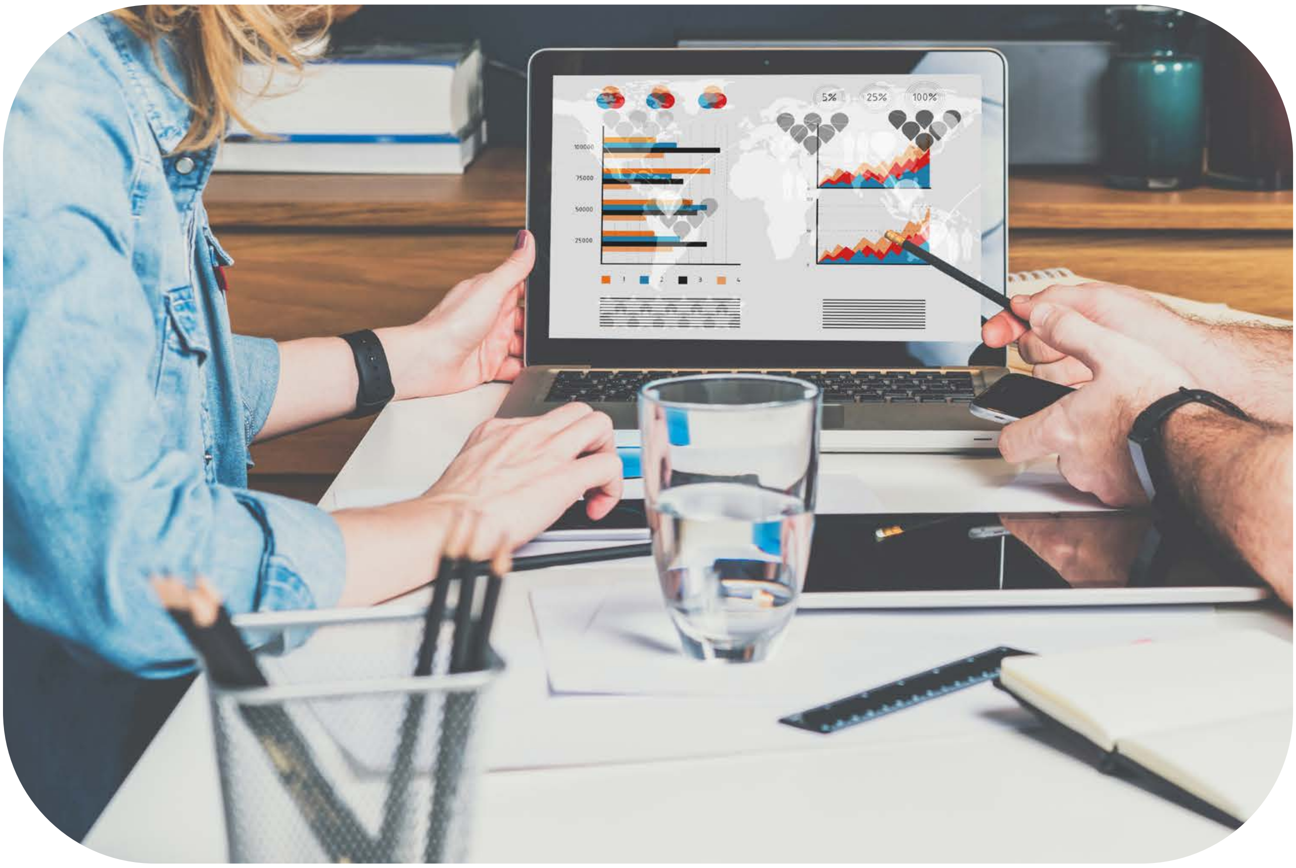
6 Steps

to Build Sales Accountability and Drive Revenue



WHITE CUP

6 Steps

Creating and managing a high-performing sales team takes time, training, and finesse. As a sales manager, you're part coach, part taskmaster, and, at times, part therapist. Setting clear goals and holding the team accountable to those goals is a surefire way to meet your company's sales goals. However, the process of accountability can be tricky and often gets lost in the day-to-day scramble to address the day's challenges.

Customer Relationship Management (CRM) and Business Intelligence (BI) tools, can be a sales manager's best friend in ensuring your team stay on track and accountable. After all, your success is tied to your sales team's success. The combination of clear communication with your team, backed by streamlined data from CRM and BI systems, creates a working environment that's ripe for success.

Let's explore six key steps to build sales accountability and drive sales. No matter your team's experience levels, they are all still human, and no technology will replace relationships driven by clear communication.

Step 1

Think of technology adoption as a team sport

Historically, sales reps can be slow to embrace new technology or processes. Seasoned sales professionals have their tried-and-true ways to get their job done. Usually, they'd rather be out in the field selling, not learning new programs.

One of the key adoptions of technology is ease of use. Everyone has a different comfort level with adopting new technology and processes. Statistics show the best adoption rates are achieved when new technology is applied in small doses instead of once.

Sales managers need to work with reps beyond the initial training provided by your CRM or BI provider. Case in point, White Cup is designed to be intuitive to use and offers comprehensive training and follow-up videos. However, no one picks up all aspects of the software immediately. Like with any other new process, the more it's used, the more valuable it becomes.

Once a sales team is up and running with a new CRM and or BI software, it will become evident quickly who is comfortable with the technology as evidenced by their sales activity. Having course-correcting conversations with underperforming sales reps doesn't have to be awkward or uncomfortable with the right approach.

1. Walkthrough dashboards and CRM together.

Ask the rep to show you, on the scorecard, a specific data block. Follow up with questions about that particular data set. Work together to identify problems and set action steps. Then, do the same in the CRM. This approach not only fosters teamwork, but it builds adoption and ownership.

2. Uncover rep needs.

Reviewing the dashboards, scorecard, and CRM together can uncover some deficiencies the rep has and maybe doesn't want to bring up. But in a setting where you're working on problems together, you'll be able to determine if the rep needs more training on the CRM or BI tools or more product training. Maybe they would benefit from a ride-along with other reps having more success selling a specific line.

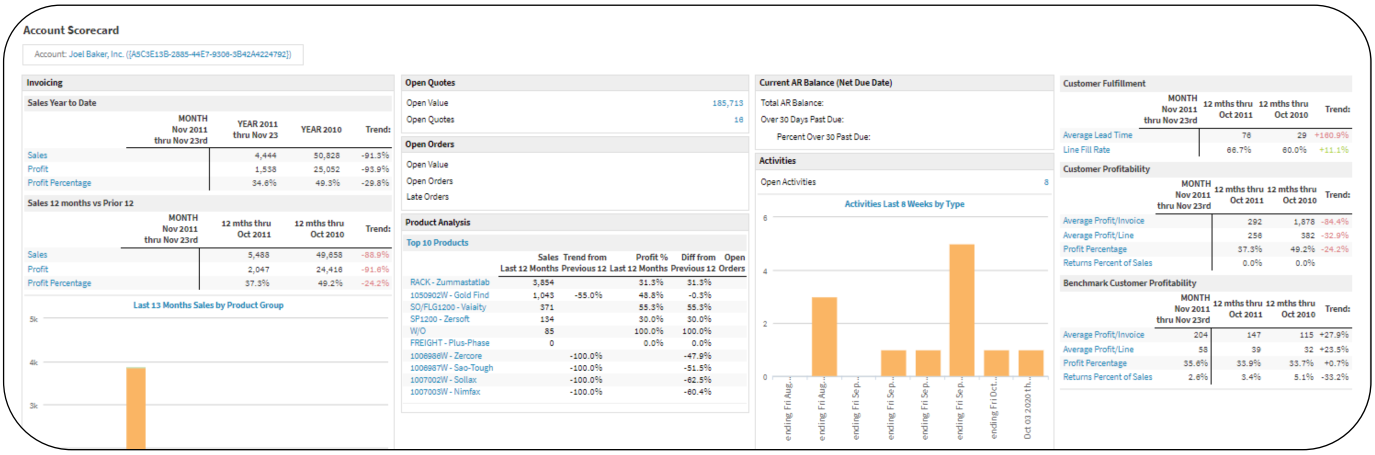
The value of solving problems together is that it helps build confidence in the rep, empowering them to be successful, which, in turn, leads to additional sales benefitting the company.g sales reps doesn't have to be awkward or uncomfortable with the right approach.

Step 2

Structure conversations for success

Salespeople, by nature, are competitive and want to improve their sales numbers continually. When a sales rep's performance drops or is underperforming compared to other team members, it's time to have potentially uncomfortable conversations to correct the course. These conversations are much more effective and often less awkward when you have real-time data and insights to review with the rep combined with ideas on crystal clear next steps for the rep to take.

Having access to accurate data is critical to productive conversations that drive sales. Our White Cup BI tool provides a sales rep scorecard for a sales manager to guide performance-related discussions. When combined with White Cup's TDF CRM, the action steps coming out of a performance conversation can be immediately added to the rep's daily to-do list, creating an efficient workflow with a trackable



Sales rep scorecards offer managers several valuable data points to keep conversations productive and positive. For example, when reviewing a scorecard, point out that missed sales are, in fact, opportunities for additional income. Based on the scorecard data, you can work with the rep to determine the next steps and expected outcomes. Always keep the conversations tactical and specific; go here, do this, report back. While it may seem remedial, it's necessary to demonstrate the value of the process to the individual.

Additionally, the scorecard offers an easy-to-understand color-coded status of red/yellow/green to indicate the health of a customer account or product line performance. The sales manager is also a taskmaster at times. Frequent scorecard reviews with your team allow you to course-correct with minor turns versus sharp curves that result from not seeing problems early on.

Step 3

Confronting underperformance by asking the right questions

Sales managers are the team's coaches. The best coaches in history know how to motivate and challenge players to push through pain and adversity. Sales managers push reps to perform well, but not so much that they become discouraged. Much like all successful relationships, it's all about communication. Here are three crucial questions to ask underperforming sales reps to improve performance without pushing them over the edge.

1. Where's your evidence?

Evidence-based conversations lead to action-oriented solutions. Reps will offer a wide variety of answers and/or excuses when reviewing a rep's performance, precisely, low points of their current situation. Sales reps will provide a wide variety of explanations and/or reasons. Ask for evidence of such claims. If they say they can't sell product X, ask, “why?” Look at historical data from specific customers to figure out the root of the problem.

2. What are you going to do differently?

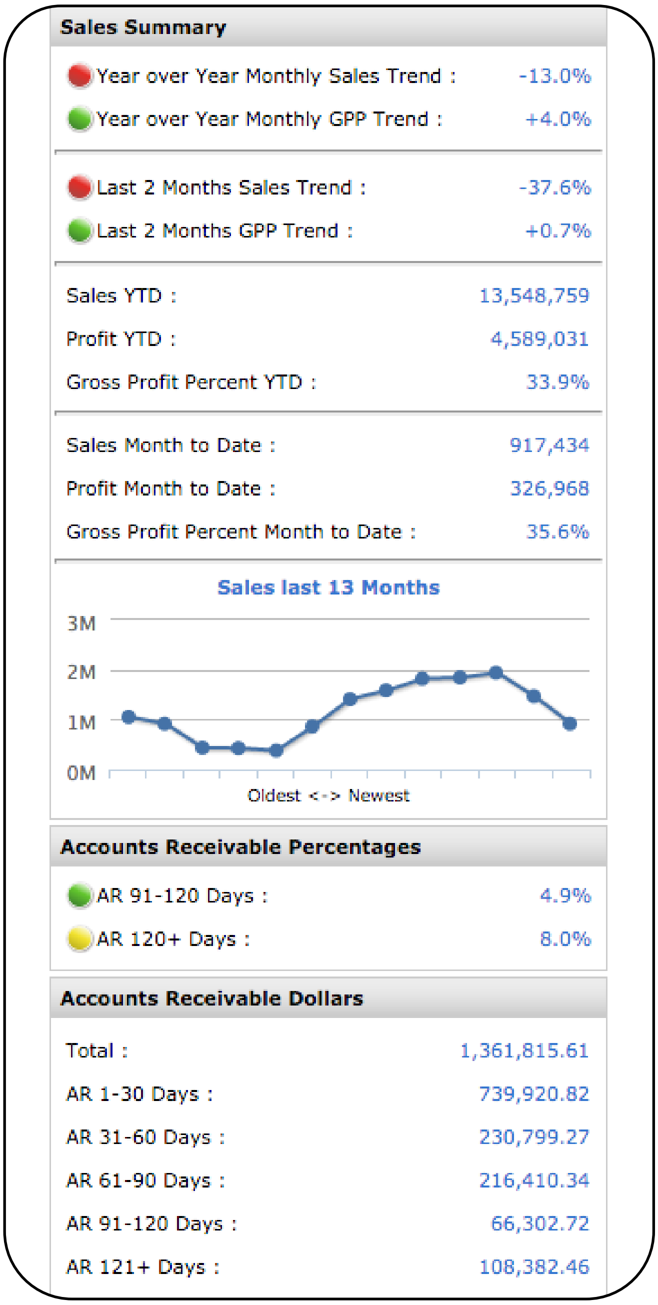
The easy answer from the rep is, "Well, I'll sell more." Selling more is a result, not an action. Discuss and create a plan on HOW the rep will sell more. Review their scorecard together to decide on specific actions and prioritize the steps together.

3. How will I know you are making progress?

The beauty and power of a CRM combined with BI is that all actions are not only fact-based, but they are also trackable. The follow-up to working on the action plan together is to track progress concurrently. Are calls being made? Has the rep set the necessary customer appointments? Establishing clear expectations with data-driven measurement tools eliminates confusion, but it also gives the rep ownership of the process and, ultimately, the outcome's success.

Step 4

Even rock stars need help selling



Sales Summary

Year over Year Monthly Sales Trend :	-13.0%
Year over Year Monthly GPP Trend :	+4.0%
Last 2 Months Sales Trend :	-37.6%
Last 2 Months GPP Trend :	+0.7%
Sales YTD :	13,548,759
Profit YTD :	4,589,031
Gross Profit Percent YTD :	33.9%
Sales Month to Date :	917,434
Profit Month to Date :	326,968
Gross Profit Percent Month to Date :	35.6%

Accounts Receivable Percentages

AR 91-120 Days :	4.9%
AR 120+ Days :	8.0%

Accounts Receivable Dollars

Total :	1,361,815.61
AR 1-30 Days :	739,920.82
AR 31-60 Days :	230,799.27
AR 61-90 Days :	216,410.34
AR 91-120 Days :	66,302.72
AR 121+ Days :	108,382.46

Every sales team has standout reps. Those who can sell anything to anyone. Always on. Always crushing their numbers. Quarter over quarter. While they may be the shining star of your team, there is always room for improvement. This is where BI and CRM can benefit the most successful reps, just as it does to boost the underperformers.

You can have the same conversation with top performers as the bottom of the team:

1. Review dashboards and look for action opportunities on red/yellow/green items.

2. Review slow or underperforming products related to the rep to determine opportunities to sell more.

3. Set clear expectations and action plans.

While the high-performing rep may not need as much guidance, the same process of walking through dashboards and their scorecard will continue to build adoption of the tools and help them see additional potential sales. Given that they know their customers better than you do, a high-performing rep armed with accurate insights can make a great rep outstanding.

Step 5

Don't be the Donut Guy

Before it was easy to have customer insights at a rep's fingertips, the standard operating procedure from many reps was to show up at the customer's office, often with donuts or other snacks to get people's attention. Conversations were passive, with reps asking, "Need anything from me today?" That approach may make a rep popular with the office workers, but it's not a sales strategy to grow an existing account.

Fast forward beyond being the Donut Guy, we now have that easy access to customer insights from CRM and BI tools. Customer conversations are much more relevant, powerful, and profitable. The conversation now shifts from that of an order taker to one of a trusted advisor looking out for the customer's best interest. And, most importantly, an advisor armed with accurate, real-time data to help customers make buying decisions.

For example, the 360-degree customer account view provided by White Cup BI allows reps to dig deep into historical data. You can uncover trends in sales, product mix, payment history, and delivery accuracy, to name a few. The customer account dashboard in White Cup BI allows reps to review the data with the customer, whether in person or on a video call. The dashboard is customer-friendly, so reps can walk through the account history together, discussing various issues.

Easy key factors that lead to relevant conversations include:

Identifying slumping sales: This opens the conversation to ask if the customer needs are changing or purchasing products elsewhere.

Review of open quotes: The conversation can focus on why outstanding quotes are still open to move the quote to a purchase order or to remove the quote from the sales rep's projections.

Opportunities to ask broader questions about the customer's business, challenges, successes, and thoughts on their specific market.

Expand on the customer focus conversation to include industry trends, trade shows, and new products.

The beauty of having TDF CRM and White Cup BI is the convenience for the rep to immediately enter follow-up items, with due dates directly into TDF CRM, making the next steps clear and actionable.

Be a Hero not a Zero: Delivery block

Another added value for customers when looking at the customer account dashboard is delivery. No one likes late deliveries, and it can cause a cascading string of problems for your customer and their end customer. The delivery data block serves two important purposes

1. Fixing current issues: If there are orders in the recent past with delivery issues, reps can prepare in advance of the meeting to understand what caused the issues and discuss how they have taken steps to ensure it doesn't happen in the future.

2. Heading off future issues: Reps can view the delivery success rates of the specific customer's products in advance of a customer meeting and the fill-accuracy of orders. If it looks like products will be late or partial orders, this is a perfect opportunity to brainstorm solutions together.

Maybe that means switching suppliers for a short time until supply chain issues have been resolved. No matter the answer, the rep is bringing up problems before they arise goes a long way as an advisor, not just a vendor.

Step 6

Reporting up the chain is easy with CRM and BI

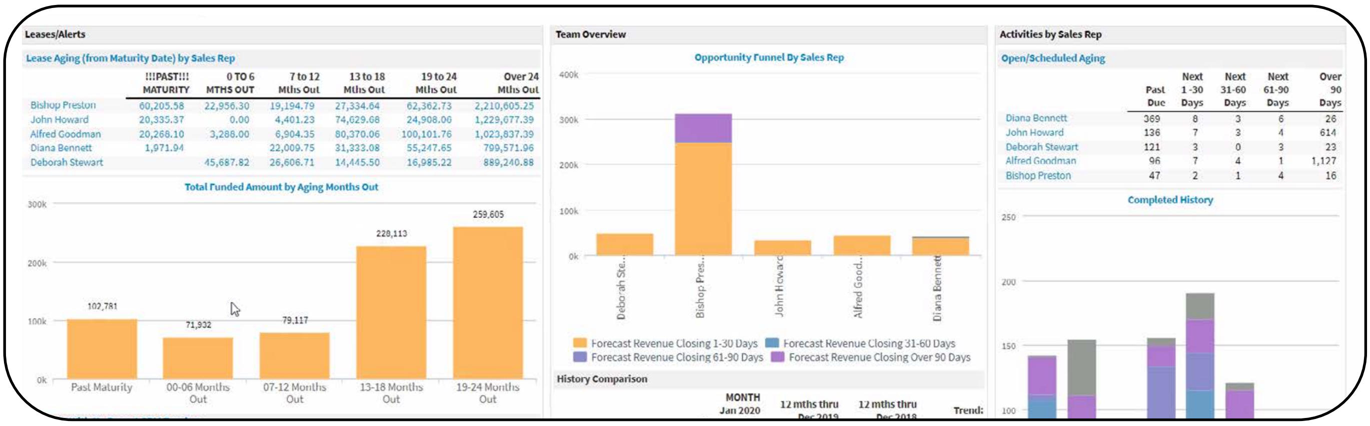
While we're musing about sales team accountability, let's talk about you. Whether you're a sales manager or the vice-president of sales, chances are you are reporting up to someone. Your CEO or President? Or a board of directors? No matter the title of who is upstream from you, the goal is to present your team's performance with confidence and make it clear there is a plan of action in place.

In White Cup BI, there is an easy way to walk your CEO through your team's performance with the Sales Manager dashboard. A few highlights to show command and control include:

1. List of sales rep top and bottom performers: You've already seen this information and, ideally, already walked through the sales rep scorecards complete with action plans in place. Easy to discuss with your boss to demonstrate while there may be some issues, you've got a solid plan to course correct.

2. List of top and bottom customer action plans: Similar to the top and bottom performing sales rep, the same analysis can be used for customers. You'll have created action plans to boost the low performers and optimize those at the top of the list.

3. New customer growth action plans: Our industry is driven predominantly by growing existing customers. So when the opportunity arises to onboard a new customer, there must be a plan to build the relationship, understand their business, and serve as a valued partner, not just a vendor. The new customer data can show how the relationship is starting with initial sales. It can also provide insights into other deals or service opportunities.



In Conclusion

While each sales team and company are riddled with their unique nuances, personalities, and challenges, there are some time-tested steps to take when developing a successful, accountable sales team, even in tough times.

- **Be tactical**
- **Be specific**
- **Remember that short term wins lead to long term gains**
- **Lift the low performers through education and clear expectations**
- **Boost the high performers to think creatively for ways to additional sales**

And finally, always lead by motivating. Sales team conversations won't always be rosy, and there's always room for improvement. But creating an environment of open communication, clear expectations with action plans pave the path to success.

If you're interested in learning how White Cup can help your team improve its performance and drive revenue, let's talk.

About us

White Cup turns a distributor's sales pains into profit gains. Our CRM, Business Intelligence (BI), and Pricing software make it easier for you to sell more, keep more profit, and beat the competition. With over 20 years of experience, White Cup is trusted by more than 1,000 customers globally.

To learn more, visit whitecupsolutions.com.

Let’s chat