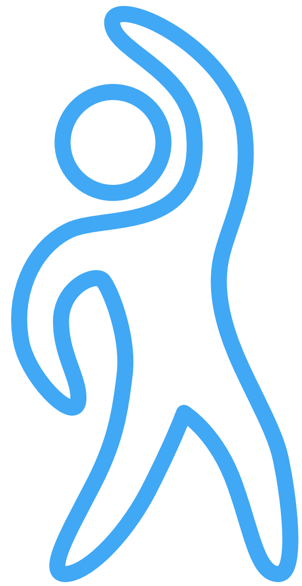
CPSA

SALES SUCCESS PLAYBOOK

TABLE OF CONTENTS



REFLECT ON LAST YEAR

PLAYS FOR THE SALES REP

- **ANALYZE YOUR RESULTS**

  Before you take off and start tackling this year's goals, first take some time to look over the past year. Whether you missed, met, or exceeded your goals, it's important to reflect on your year and what you should change or keep the same.

  Don't just look at your final results; dig deep. Take the time to really analyze your performance, effort, skill, and confidence. For example, ask yourself:

- What percentage of leads converted?
- Did prospects tend to get stuck or lose interest at a certain stage?
- When were prospects most responsive?
- What approach worked best or did not work at all?
- What tasks slowed you down?
- If you could change one thing about your day, what would it be?

Getting used to analyzing your performance and projecting the pipeline is crucial to keeping yourself on track. Once you have taken a good look at the past, you should feel more confident planning for this year and have a better understanding of your sales habits.

- **SHARE AND DISCUSS SUCCESSES**

  Although every salesperson is working on their own quota and focused on their own territories and clients, there are always sales superstars leading the pack. Take note of who ended 2017 on a high note and set aside time to meet with them. Prepare some questions to see how their approach differs or is similar to yours. Consider how you could adopt some of their successful strategies into your process.

  Ask them about their…

- Daily routine
- Follow-up frequency
- Prospecting strategy
- Use of marketing materials
- Approach to meetings and presentations
- Extra steps they take or have eliminated

Some salespeople might feel intimidated by the top dogs on the sales team. Take it as an opportunity. Meet with them as early in the year as possible. They are more likely to be excited about their successes and want to discuss them before they get busy moving onto the new year.

PLAYS FOR THE SALES LEADER

- **REVIEW LAST YEAR'S RESULTS AND CELEBRATE SUCCESSES**

  It can be tempting as a sales team leader to want to jump right into a new year and put the last one behind you. Tackling a whole new set of numbers with a reinvigorated staff is exciting, but first you need to take time to look back. Figuring out where you had successes and failures the previous year will set up your team for even greater success in the new year.

  Take a deep dive into your CRM data and set up one-on-one meetings with your team and other department heads. All the information you can gather on what went right and what went wrong will help you get a full picture of your sales process. The hard data will tell you one story, but your individual meetings will give you better insight into your team's personal struggles and real feedback from clients and the industry.

  While you are still focused on last year, take the chance to recognize your top performers. This is the last chance you will have before diving into the new year to celebrate a job well done and congratulate your team. If your company doesn't have a set end-of-year ceremony, take your team out to lunch or bring in coffee and donuts to start off the new year right.

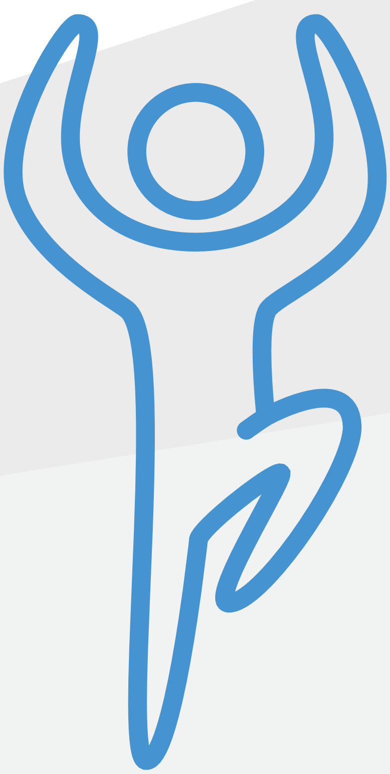
"TAKE A DEEP DIVE INTO YOUR CRM DATA AND SET UP ONE-ON-ONE MEETINGS WITH YOUR TEAM AND OTHER DEPARTMENT HEADS."

- **TAKE A HARD LOOK AT YOUR TEAM**

  If you want to maximize your team's success this year, you need to know your players. A great sales manager will know the strengths and weaknesses of each member of their sales team. This will give you a better view of what your team needs to work on, what training will be helpful, and where they excel. It will also give you a preview of which reps you can send off to start selling and which ones might need more guidance.

  Ask your top reps for details on their processes, scheduling, lead nurturing habits, and presentation tendencies. Compare that to the answers from your newer or less productive reps and look for differences. Share your insights with the rest of your management team to let them know what traits you should be looking for in the future.

"ASK YOUR TOP REPS FOR DETAILS ON THEIR PROCESSES, SCHEDULING, LEAD NURTURING HABITS, AND PRESENTATION TENDENCIES."



- **ANALYZE BOTTLENECKS**

  As part of your review on last year, think about times your team was held back or felt stifled by processes, external tasks, or red tape. For this year to be effective, finding and targeting these bottlenecks will help not only your team, but the entire company.

  Not all of these issues will come from the sales department. While it's important to make sure your lines of communication, data input, and sales processes are clear and effective, make sure to ask your reps about setbacks they encounter with other departments. If sales reps are waiting weeks for updated marketing materials or expense approval from HR, it can hold back their progress and potentially lose them deals.

ESTABLISH GOALS FOR THE NEW YEAR

PLAYS FOR THE SALES REP

- **CREATE QUOTA MINI-GOALS**

  Wrapping your head around an entire year's quota can be daunting. Make sure you stay on track and can accurately gauge your weekly and monthly planning by breaking your quota into smaller sections. Whatever works best for you—quarterly, monthly, or weekly. This gives you a better picture of how many leads and meetings you should be having within a set time frame.

  Smaller goals are more manageable and give you the ability to celebrate small successes throughout the year. It will also make updating your manager easier if you can accurately explain your progress and have a detailed understanding of what is expected of you.

- **MAKE A PLAN**

  Now that you have cut your quota into manageable mini-goals, make a plan for the year. Don't just take your quota into consideration; make a well-rounded plan including your performance, professional development, and department improvement. Take note of the metrics your manager will be focusing on. Obviously, your quota will be a main performance metric, but there are other ways your supervisors might be assessing your work. Ask about their expectations for conversion rates, customer satisfaction, referrals, etc.

  If you think you will need additional coaching or training, ask for it! The best become the best because they ask for help and practice their craft. Within the first month of the new year, make a goal to focus a full day on skills training.

  Read through the marketing and sales collateral you will be using this year. It's important to do this at the start of the year so you know exactly what content you have at your disposal and what information it contains. All content created is made to help you close the sale.

" THE BEST BECOME THE BEST BECAUSE THEY ASK FOR HELP AND PRACTICE THEIR CRAFT."

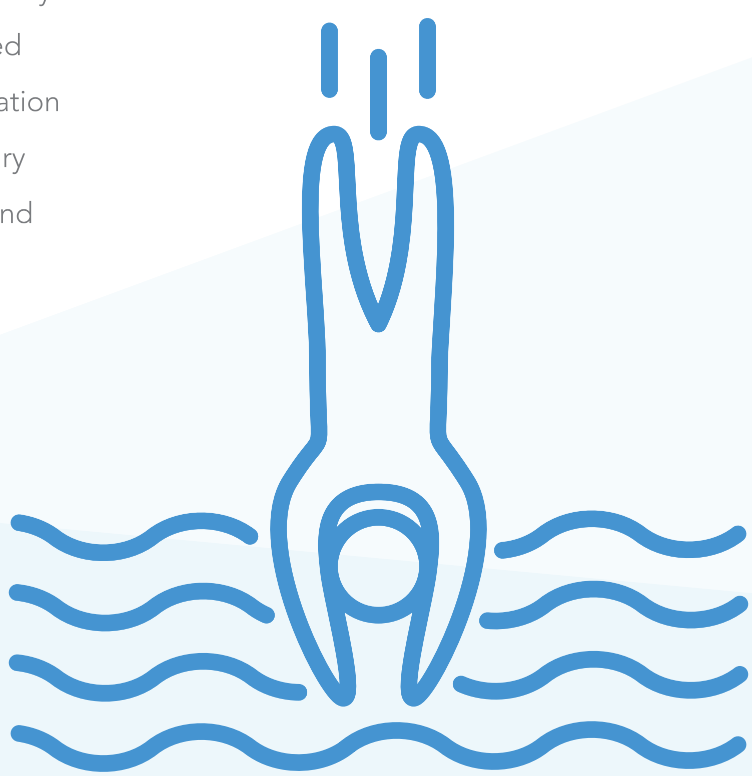
- **REACQUAINT YOURSELF WITH THE BUYER**

Year over year, there might not be drastic changes in your typical buyer persona, but that doesn't mean your industry isn't changing. While your manager is preparing the sales team for the year, listen for any changes to your ideal prospect. Ask questions to see if there has been any strategy pivots to reflect successes and failures from the past year. Perhaps your target buyer is now older and spending money on items that you've never competed against. There are many reasons why you might need to update your strategy. Competitors, market size, and industry trends all influence how your buyers behave.

Think about how your targets have shifted in:

- Company size
- Industry
- Need
- Location
- Salary
- Spend

"WHILE YOUR MANAGER IS PREPARING THE SALES TEAM FOR THE YEAR, LISTEN FOR ANY CHANGES TO YOUR IDEAL PROSPECT."



Make sure these changes end up in your sales and marketing processes. Sales and marketing content should reflect competitor and industry changes while speaking to your adjusted buyer persona. Your discovery questions will need to adapt because what was once a qualified lead may not qualify anymore. Also, channels and messaging will have to change based on your new buyer persona.

PLAYS FOR THE SALES LEADER

- **DETERMINE KPIS**

It's up to you to tell your sales team which metrics you will be focusing on. Salespeople know they will be judged based on their quotas but will aim for other targets if you point them out. Decide which key performance indicators (KPIs) you think best represent sales performance at your organization. Some examples are:

- Leads
- Conversions
- Meetings set
- Demos completed
- Presentation-to-close ratio
- Leads of a certain buyer type
- Deal size

Your team will follow your lead and work towards goals in certain areas over others. Make sure the KPIs are in line with your company's goals; be as specific as possible. Show your team how you will be judging high or low achievement and the steps the business is taking to help the reps improve these metrics. You need to decide where you want their focus before you can set proper goals.

- **DECIDE ON NEW TECHNIQUES TO IMPLEMENT**

Each year should feel fresh and exciting. That means adding new techniques and trends into your sales process. Meeting with your top reps and the management team should have given you a jumping-off point for new ideas to try and new tools to use to achieve your overall business goals.

Make sure the techniques or strategies you aim to implement are realistic, quantifiable, and tactical. Salespeople want actionable tips that will make them more successful. If your plan is complicated or unstructured, you won't get the buy-in you're looking for.

Insight-based selling helps you get inside your buyer's mind. Spend time evaluating buyer and market insights and pass information on to your sales team and marketing department. Take your results from last year, feedback from your reps, industry insights, and buyer research and come up with new ways to capture your buyers' interest. Perhaps your product is now more cost effective, your company won an industry award, or your service has improved.

"SHOW YOUR TEAM HOW YOU WILL BE JUDGING HIGH OR LOW ACHIEVEMENT AND THE STEPS THE BUSINESS IS TAKING TO HELP THE REPS IMPROVE THESE METRICS. "

- **COLLABORATE WITH MARKETING ON SALES CONTENT**

  Work with marketing to find key statistics and attention-grabbing facts for your salespeople to use in their pitches. This can include stats, ROI details, key features, and industry research. Work with the marketing department to study the buyer persona and find key insights that are sure to pique their interest.

  Stats and key product features will get the attention of your prospects, but make sure you build a full story of your product or service to describe it to potential customers. You want your solution to be the perfect ending to their buyer's journey. Make sure you come up with the whole story along with the marketing team so everyone is aligned and all the sales and marketing content is consistent.

  Look over your completed deals from the last year. Who can you reach out to for a testimonial? Did you have any great reviews online or from social media to incorporate into your content? Word of mouth and great reviews are invaluable to sales reps.

"WORK WITH THE MARKETING DEPARTMENT TO STUDY THE BUYER PERSONA AND FIND KEY INSIGHTS THAT ARE SURE TO PIQUE THEIR INTEREST. "

PLAYS FOR THE SALES LEADER

- **DETERMINE YOUR NEW SALES STRATEGY**

Before you can kick off the new sales season, you need to have a plan in place. By now, as a sales leader, you have reflected on last year's results and met with your team. Now is the time to meet with your executive team and find out what the main priorities are for the year.

Perhaps you are launching a new product, offering updated services, or targeting a new buyer. Once you know the high-level strategy plans for the entire company, you can filter the information to your team and each individual rep. Make sure to pass along any details you receive on the state of the company as a whole, the industry, and your main competitors. The broader and clearer the picture of your entire industry, the better your reps will be able to sell.

- **CLARIFY SALES PROCESS**

After you decide on the sales techniques you want to implement, add them to your sales process. If you want your reps to reach out to prospects on social media or add a new step in the demo presentation, this is where you lay that out. Make sure your strategies are easy to follow and can be completed by both new and experienced salespeople.

Your sales system needs to be refined and clear for it to work. Break your sales process into phases and let each salesperson know who is involved and what skills are required to complete each stage. Outline the marketing content that fits with each phase of the buyer's journey and how it should be used. A detailed system needs to be in place before your salespeople can sell effectively. It's up to you to use all the information you gathered during your review on last year to clarify the sales process.

"BREAK YOUR SALES PROCESS INTO PHASES AND LET EACH SALESPERSON KNOW WHO IS INVOLVED AND WHAT SKILLS ARE REQUIRED TO COMPLETE EACH STAGE."

- **DEFINE RESPONSIBILITIES**

  Whether you're working with the same team from last year or introducing new members, the individual and departmental responsibilities must be clear. Your sales process is set, but unless everyone involved knows what they are responsible for and who they can turn to for help or clarity, things will fall through the cracks.

  Set as many guidelines as you can and make sure everyone is comfortable with their workloads while you start the year. New responsibilities can be added and adjusted later on, but building structure early is critical.

KICKOFF—GAME PLAN

SALES REP

- ☐ Analyze Last Year's Results
- ☐ Take out the Trash
- ☐ Share and Discuss Successes
- ☐ Create Quota Mini-Goals
- ☐ Make Your New Plan
- ☐ Reacquaint Yourself with the Buyer

SALES LEADER

- ☐ Review Last Year's Results and Celebrate Successes
- ☐ Take a Hard Look at Your Team
- ☐ Analyze Bottlenecks
- ☐ Determine KPIs
- ☐ Decide on New Techniques to Implement
- ☐ Collaborate with Marketing on Sales Content
- ☐ Determine Your New Sales Strategy
- ☐ Clarify Sales Processes
- ☐ Define Responsibilities

Q2

GET IN THE GROOVE

GATHER FEEDBACK

PLAYS FOR THE SALES REP

- **PREPARE FOR REVIEW**

  By the beginning of the second quarter, you should be ready to have your first review with your manager. You need to explain how your pipeline is forecasting, your plans for making quota, and your results from the beginning of the year.

  Ask your manager beforehand if there are specific details they will be asking about or if there is anything else you can prepare. The more prepared you are for the meeting, the more confident you will be. Even if you haven't had great results so far this year, coming in with a solid plan will ease your manager's mind and set you up for future success.

- **BE OPEN TO TRAINING**

  Now that you are getting into the groove for the year, it's a great time to start building up your skills. At this point, your sales leader may be introducing some new training, asking you to attend seminars or webinars, bringing in sales coaches, or offering new sales tools.

  Take advantage of these learning opportunities. Whether you have been selling for years or are the green rep on the team, any learning experience is a good one. After your review, ask your manager if they could listen in on one of your calls or sit in on a meeting and provide feedback. Early on in the year is the time to refine your tactics and grow your professional skills.

CPSA

- **BRAINSTORM HOW TO BREAK DOWN ROADBLOCKS**
  Your co-workers hold a wealth of knowledge. Like you, they are reaching out to prospects, following up, holding meetings and presentations, and trying to close deals. Meet with the reps in your territory or on your team to see if you can help each other combat common roadblocks you are all facing.

  Perhaps many leads are choosing the same competitor over you each time. Maybe they say it's too early in the year to commit to buying. Whatever the reasons, coming up with a team strategy to overcome these objections will make everyone stronger.

PLAYS FOR THE SALES LEADER

- CHECK IN WITH YOUR TEAM
  Now that the first quarter has passed, you should be getting a clearer picture of your prospects for the year, how your sales processes are working, and how your team is functioning. As you head into the spring, take the time to meet with your team to go over the first quarter, but also note common objections and bottlenecks they are facing.

  Before you meet with a member of your staff, think of at least two concrete ways they can improve their work. Perhaps they would benefit from an online training webinar or a mock presentation to work on their public-speaking skills. While your top reps may just need a quick check in, you can boost your newer salespeople's confidence by coaching them early.

- **INTRODUCE SALES ENABLEMENT METHODS**

  Never before has there been so much technology for sales reps and teams. CRM systems—fully automated and robust—allow you to track almost anything and contribute like an extension of the sales team. From quoting and pricing tools and presentation software to social media automation, it has never been more efficient to be a salesperson.

  Sales enablement is the act of creating processes, implementing technology, and training staff, leading to increased success and efficiency of a sales department. Now that you have seen how your team is working in the new year, it's time to decide which sales enablement methods you want to implement. Consider deploying a new tool like a mobile CRM to boost rep productivity. Conduct training courses and sales coaching to increase skill development.

  If you do not already have one, invest in a CRM system. As a leader, it is your responsibility to have accurate reporting, forecasting, and customer information. A CRM system is the best way to ensure all your sales reps are following the sales process and that you have all the information you need to do your job. Although salespeople often push back against CRM implementation, if you explain its value, integrate it with other sales software, and match it to your process, the transition should be smooth.

"A CRM SYSTEM IS THE BEST WAY TO ENSURE ALL YOUR SALES REPS ARE FOLLOWING THE SALES PROCESS AND THAT YOU HAVE ALL THE INFORMATION YOU NEED TO DO YOUR JOB."

- **ELIMINATE TEDIOUS TASKS**

  As a sales leader, you have spent hours working tediously on your sales processes and poring over every recorded piece of information. Now that you have seen your processes in action, it might be time to tweak them.

  If your salespeople are wasting their time performing unnecessary tasks, you are simply wasting money. Ask what steps are too time consuming or take your team away from more vital tasks. If those steps are in fact important, explain to your team the reasoning behind them. For many tasks, there are automation systems that can help. Lastly, if the task can be adjusted or eliminated, do so as soon as possible.

NURTURE LEADS

PLAYS FOR THE SALES REP

- **WORK ON YOUR SOCIAL SELLING**

If you've been living under a rock, it might be news to you that consumer buying habits have changed. The buyer is in control and more and more salespeople are using social selling as a combative strategy.

Despite the rise of social media and the millions of people it reaches, some companies are hesitant to implement a social selling strategy. Don't let that stop you from jumping on the social bandwagon. Work with your co-workers to come up with a strategy or just jump in and analyze your results. Use social media as a way to engage with your customers, find new prospects, and show off your personality.

- **COMMIT TO PRE-CALL RESEARCH HABITS**

In our interconnected world, there is no need for you to reach out to a prospect with no background information. Social media makes it easy to get basic personal and company information for a variety of prospects.

This part of social selling allows salespeople to gather information without even contacting the lead. A prospect's title, responsibilities, mutual connections, and interests can all be discovered on LinkedIn.

Some other spaces you should take a look at are:

- Twitter (buyer and company)
- Company website
- Company media and press releases
- Trending news
- Industry blogs and publications
- Google (buyer and company)
- Competitor sites and news releases

Your first call with a prospect will establish trust and your voice as an authority. Don't use a cookie-cutter script. Take the time to do your research; the effort will be appreciated.

- **ADJUST SALES CONTENT THAT IS NOT EFFECTIVE**

  By now, you will have nurtured your leads through workflows, met with prospects, and sent more PDFs than you can count. The time has come to analyze how well your sales content is working and how it can be adjusted.

  Think about common questions you get from your prospects. Are those questions answered in your content? Have you accurately highlighted the features your buyers most respond to? Your marketing department is there to help. Work together to adjust sales content, aligning the two departments.

ADJUST YOUR STRATEGY

PLAYS FOR THE SALES LEADER

- **EVALUATE INBOUND LEAD GENERATION AND MQLS**

  Your sales reps have worked with marketing to make sure all the content they use is relevant, clear, and informative. It is now the sales leader's responsibility to make sure the marketing department is generating enough leads to fill the sales funnel and that MQLs are defined properly.

  A common complaint among salespeople is that the leads they receive from marketing don't fit the buyer persona, aren't ready to meet with a rep, or have a low chance of closing. This is why you worked so hard at the beginning of the year to outline these factors. Now that you have some data to work with, evaluate how your lead generation is going. If there are obvious errors and setbacks, fix them as soon as possible.

- **DEFINE YOUR LEAD NURTURERS AND YOUR CLOSERS**

  Leads are what keep your sales department running and your forecast full. They are the lifeblood of any business. You need to know who on your team works best with fresh leads and who your best closers are. Some of your reps will be confident in both scenarios, but these superstars will not make up your whole team.

  Some reps will know your buyer inside and out. They can spot an ideal prospect a mile away. Try letting them take the lead with social selling and reaching out to brand-new qualified leads. Some reps are your comfortable closers and excel at presentations and closing the deal. Every aspect of the process is crucial to team success, but try giving your reps more responsibilities that match their selling skills.

"A CRM SYSTEM IS THE BEST WAY TO ENSURE ALL YOUR SALES REPS ARE FOLLOWING THE SALES PROCESS AND THAT YOU HAVE ALL THE INFORMATION YOU NEED TO DO YOUR JOB."

- **WATCH FOR REPS WHO ARE ON THE MOVE**

  Sales is an industry of high turnover. That is a hazard of the business. Even if your team is filled with superstars, there is a significant chance you will need reinforcements soon. This may be due to poor performance, but sick leave, maternity/paternity leave, and relocation can all lead to extended absences and vacant positions. Stay ahead of the recruitment game by keeping your eye out.

  Talk to your top reps and ask them to refer quality people they know who may be interested in a new career. Let your sales reps know what your company looks for in a great salesperson. If you lay out the experience, qualifications, and skills you are looking for, your staff will know what to look for and when to refer someone.

SALES STATS AND HELPFUL TOOLS

SOCIAL SELLING

- 4/10 reps have recently closed two to five deals thanks to social media.
- 65% of reps that use social media fill their pipelines, compared to 47% who didn't.
- Social selling tools increase win rates by 5% and deal size by 35%.

SALES PROSPECTING

- 40% of salespeople say prospecting is the most difficult part of the sales process.
- The average salesperson makes more calls in the last month of the quarter than the first two. The success of last-minute calls are lower than any other month.
- Only 19% of buyers want to talk to a salesperson in the awareness stage, compared to 60% of buyers who reach out during the consideration stage.
- On average, it takes 18 calls to reach a buyer.

SALES EMAILS

- The most effective words to use in your email subject lines are demo, connect, cancellation, apply, opportunity, conference, and payments.
- The ideal subject line is three or four words long.
- Emails should be between 50 and 125 words to be effective.
- Emails asking questions are 50% more likely to get replies.

SALES PRODUCTIVITY

- More than half of salespeople get tips from their peers for improvement.
- High-performing sales organizations are twice as likely to schedule ongoing training.
- The most popular sales tools are CRM, social prospecting, data and list services, and email engagement systems.

SOURCE:

https://blog.hubspot.com/sales/sales-statistics

Q3

THE MID-SEASON SLUMP

PREPARE FOR THE SECOND HALF

PLAYS FOR THE SALES LEADER

- **REALIGN SALES AND MARKETING**

  Entering the second half of the year should be a big push for any business. It's time to check back in with your salespeople and evaluate processes while there's time for adjustment. As a sales leader, you are generally the link between the sales and marketing departments. Take pride in this position. You are able to make sure your reps get what they need, while gaining crucial insights from marketing to pass along.

  Meet with your team and brainstorm new ways to position your product or how a change in messaging might have a bigger impact. This will give your marketers real feedback on how their content is being received and allow them to make improvements. Take this time to check in with your marketing and customer service teams as well. They are filled with information—questions your customers are asking, how they are finding and consuming your content, and common complaints.

- **ADJUST YOUR FORECAST AND BUDGET**

  It's getting down to crunch time. At the start of the second quarter, you need to put on your forecasting hat and create an accurate image of what the rest of your year will look like. Take the data from the last six months and project it forward. These numbers tell you how your reps have been working and what they have in the pipeline. All the information you need should already be in the CRM.

  Once you have your projection, take into account how improved techniques and content will influence your close rate. Don't assume you can change your projection with simple hard work. You will need a plan and concrete steps your team can take to increase momentum.

- **DEFINE AND PREDICT CHALLENGES**

  You are now entering the summer season where people will be taking time off and buyers tend to be busy and distracted. As long as you understand these challenges and are prepared to meet them, this shouldn't be a problem. Put a name to any potential upcoming issue and have a plan in place before it impacts your numbers.

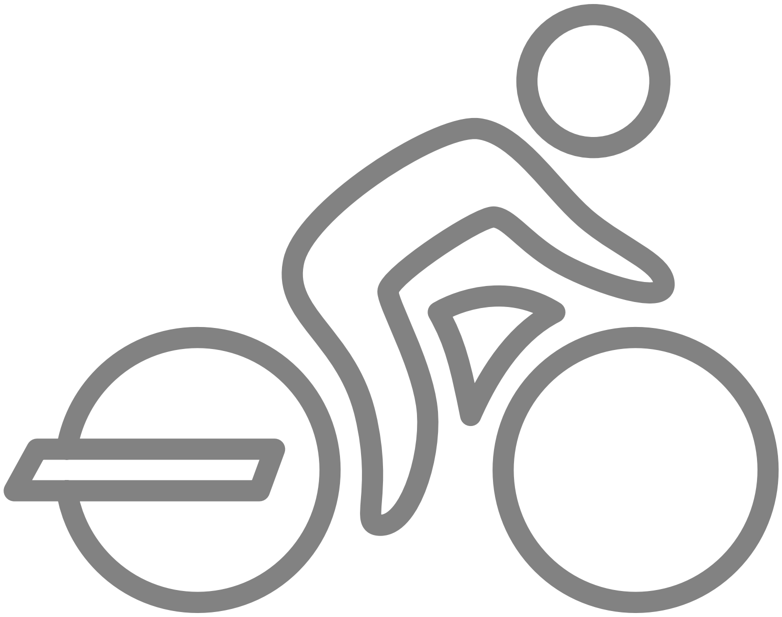
STAY MOTIVATED

PLAYS FOR THE SALES REP

- **PLAN AHEAD**

  The summer months of Q3 bring with them warm weather and holidays, weddings, and distractions. The same goes for your prospects. Although it's tempting to take your foot off the gas and enjoy the patio weather, don't let yourself become too complacent.

  Plan out your summer and recognize dates you will be away, as well as times your co-workers and manager will be out of the office. Before you leave, be sure to confirm someone is looking after your clients or set time aside to answer emails and other inquiries. While members of your team are away, don't use it as an excuse to slack off. You are holding down the fort and will only be hurting yourself in the long run if you check out.



- **USE THE SLOWDOWN FOR SKILLS DEVELOPMENT**

  One of the ways you can stay motivated and fill time during the summer slow periods is to continue your skills education. Schedule time for webinars, take free online classes and courses, meet up with your mentors, and practice your pitches.

  During this time, you will finally have a chance to work on your professional development without feeling like it's taking up your time. Take advantage of the slowdown and boost your credentials, learn from your peers, and elevate your skills.

PLAYS FOR THE SALES LEADER

"COMBAT TEAM APATHY BY COMING UP WITH NEW INCENTIVES AND SPECIAL OFFERS THEY CAN OFFER THEIR LEADS."

- **BRAINSTORM INCENTIVES AND SPECIAL OFFERS**

  You may need to change up your managing strategy during the summer months. Your reps will most likely be lacking focus and may need new reasons to get motivated. Combat team apathy by coming up with new incentives and special offers they can offer their leads. This will give them something new to aim for and an exciting new pitch to try.

  Lean into the summer break and work with your reps to find solutions that will work for them. Raise morale by asking your top reps for offer ideas and give them a chance to contribute. Make an internal contest or offer a prize for the rep who books the most demos or closes the biggest deal.

WORK WITH YOUR TEAM TO BOOST MORALE

The summer slump is always a worry for sales leaders. Your team disappears on vacations. It seems like all your prospects are ignoring your calls. It can be easy to fall behind and lean into the casual nature of the summer. Don't let this happen!

Your team will be looking to you for how to handle the work slowdown. Keep your energy high and your attitude positive. Now is the time for collaboration and solutions, not for blaming the team and avoiding the problem.

RECOMMIT TO YOUR SALES PROCESS

You and your sales process have made it through half the year. Congratulations! We're sure your sales team was excited about your updated sales process at the beginning of the year, but the diligence may have waned. It's time to recommit to your processes and make any necessary adjustments.

Has your team been following up with customers post-sale for feedback? Are your reps entering customer details and meeting dates in the CRM? These small details can dull over time due to lack of enthusiasm from your team. If you are riding high after the first half of the year, discuss how your process helped you get there. If you are going to need maximum efficiency in the second half of the year, ask your team if changes need to be made.

"NOW IS THE TIME FOR COLLABORATION AND SOLUTIONS, NOT FOR BLAMING THE TEAM AND AVOIDING THE PROBLEM."

SOCIAL SELLING

1. Track today's wins
2. Run a contest
3. Reward and recognize the team publicly
4. Plan team-building workshops and outings
5. Focus on sales activities, not results
6. Resist separating managers from sales reps
7. Encourage team and individual creativity
8. Be as transparent as possible
9. Over-deliver to your clients
10. Replace a typical meeting with a coffee break or walk around the block

Q4

FINISH STRONG

INCREASE THE MOMENTUM

PLAYS FOR THE SALES LEADER

- **OPEN UP THE FUNNEL**

  It's time to put the pedal to the floor and open up your sales funnel. For the last quarter of the year, it's time to chase after everyone you have spoken to all year and rally undecided prospects. Most likely, your sales strategy involved an end-of-the-year offer or special incentive. Reach out to everyone in your funnel and let them know about limited-time offers.

  Ask marketers to adjust their lead-qualifying process if they need to in order for them to send you leads they wouldn't have previously. This will give you a bigger pool to reach out to and increase your chances of meeting your quota.

- **FOCUS ON THE FOLLOW-UP**

  Throughout the year, you have contacted and met with a variety of prospects. Some of these deals closed, some are in limbo, and others never went far. Any prospect still undecided on your list needs to be contacted.

  Following up is never the salesperson's favourite thing to do, but at this point in the year, there is no reason to not chase every lead. Ask your prospects to give you a concrete yes or no. This way, you will waste less time on deals that will never close. It also gives you the chance to introduce new special pricing and offers that might change their minds.

"ASK MARKETERS TO ADJUST THEIR LEAD-QUALIFYING PROCESS IF THEY NEED TO IN ORDER FOR THEM TO SEND YOU LEADS THEY WOULDN'T HAVE PREVIOUSLY. "

- **USE ALL AVAILABLE TOOLS**

  You are right in the middle of the big end-of-year push. Is your day as optimized as it could be? Think about how you are using your sales tools. Are you entering data into the CRM properly? Have you added new leads in a nurturing workflow?

  It can be easy at this time of the year to get caught up in rushing to the sale. Try to avoid this by following the process closely and using the tools you have at your disposal. Most likely, there are automation features that would make your life easier and additional information you are missing because you aren't using your tools to their full advantage.

PLAYS FOR THE SALES REP

- **CLEAR OUT DEAD LEADS OR LOST ACCOUNTS**

  Now is not the time to get bogged down with inaccurate data and distracted focus. Schedule time to go through your CRM and remove dead leads and lost accounts. This information will confuse your numbers and can make you believe you have more prospects than you do. If you want to finish the year strong, you need to have an accurate picture of where you are and where you need to go. You can't see the full picture if you're still focusing on deals that are over.

- **SET UP SALES SEQUENCES OR ADJUST NURTURING CAMPAIGNS**

  For the last push of the year, it's time to get creative with your email campaigns. Talk to your co-workers and come up with a list of tactics that worked best for them. It's time to capture all the leads you have built all year and drive them towards the sale. Bring the list to your manager and create a plan for new sales sequences or email workflows. You should have lists of MQLs and SQLs. Work with marketing to create new content specifically for MQLs and SQLs from earlier last year.

  Not only will this give you a great push and give your team some momentum, but it will also allow you to weed out deals that will be pushed to next year.

"THERE ARE AUTOMATION FEATURES THAT WOULD MAKE YOUR LIFE EASIER AND ADDITIONAL INFORMATION YOU ARE MISSING BECAUSE YOU AREN'T USING YOUR TOOLS TO THEIR FULL ADVANTAGE."

PLAYS FOR THE SALES LEADER

- **DO YOUR SALES REPS HAVE WHAT THEY NEED?**

  To finish the year strong, you need to make sure your reps have all the equipment, tools, and support they need. Has marketing provided them with the correct content on last-minute offers? Do they have time and support for extra demos and presentations?

  Think about how you can help and what you can do to keep the energy levels high. The end of the year is a stressful time for a sales leader, and it's tempting to ask how the numbers are going daily. Resist this urge and instead ask how you can help, if they need anything, and whether they are having any specific roadblocks.

- **EVALUATE CRM DATA**

  Behind the scenes, sales leaders in Q4 are usually found poring over the numbers. Soon enough, you will be explaining your results to your management team and C-suite, so you will need to keep on top of how your team is doing. Ask your reps for confirmation about leads and prospects in their pipelines that you are unsure about. Get the widest and most accurate picture you can get of the funnel early on in Q4. That way, you are less likely to run into surprises and lost deals you were banking on.

"ASK YOUR REPS FOR CONFIRMATION ABOUT LEADS AND PROSPECTS IN THEIR PIPELINES THAT YOU ARE UNSURE ABOUT."

SET A PLAN TO LAND LARGE, UNDECIDED ACCOUNTS

There are always a few deals that everyone is counting on by the end of the year. These important contracts will either make or break your year. To keep your salespeople focused and boost their confidence, decide how you plan on closing these accounts.

Your involvement will give your salespeople an added weapon and will allow you to ask how certain steps in your strategy are working. Trying out a team strategy to closing a deal also gives you insights for the future. If a deal closes, you know the strategy was a success. If not, you can adjust and refine it for next time.

"TRYING OUT A TEAM STRATEGY TO CLOSING A DEAL ALSO GIVES YOU INSIGHTS FOR THE FUTURE. IF A DEAL CLOSES, YOU KNOW THE STRATEGY WAS A SUCCESS. "

CPSA

WIN THE YEAR

PLAYS FOR THE SALES LEADER

- **EVALUATE WHAT WORKED AND WHAT DIDN'T**

You made it! The final numbers are in and it's time to head into the holidays. This is where the ongoing work you have done will come in handy. All the feedback you received from your team, the marketing department, and the customer service reps gives you everything you need for your end-of-year review.

By examining the highs and lows of the year, you can see trends, how internal and external factors influenced your results, and if your KPIs were the right metrics to track. Tak to your reps to find out how competitors and industry trends affected their sales. Gather this information now while your reps still have it in their heads. Use this information not only for your end-of-year reporting but as a starting point for next year. Once the year is over and the next year's quota is set, it's hard to go back and evaluate.

FINAL BUZZER CHECKLIST

SALES REP

- ☐ Open up the funnel
- ☐ Focus on the follow-up
- ☐ Use all available tools
- ☐ Clear out dead leads and lost accounts
- ☐ Set up sales sequences or adjust nurturing campaigns
- ☐ Celebrate!

SALES LEADER

- ☐ Set the example
- ☐ Ask yourself if your reps have what they need
- ☐ Evaluate CRM data
- ☐ Set a plan to land large, undecided accounts
- ☐ Evaluate what worked and what didn't
- ☐ Celebrate!

ABOUT THE CANADIAN PROFESSIONAL SALES ASSOCIATION

Since 1874, we've been developing and serving sales professionals by providing programs, benefits, and resources that help you sell more, and sell smarter.

CONTACT US TODAY

MemberServices@cpsa.com or
1-888-267-2772 to see how we can help you and your team reach new heights in sales success.

CPSA