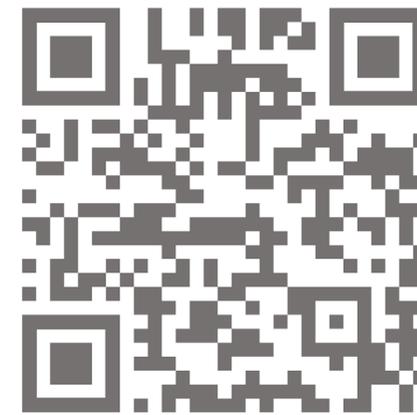# Win, lose, or draw?

3 moves to help you achieve next level sales results

Today we'll cover…

- How to get your new sales reps up to speed, quickly
- Improve your leader's ability to support their teams
- Increase sales from your existing customers

Luminaries
Consulting

Organizations with a strong onboarding process can improve employee retention by…

82%
X

Luminaries
Consulting

Organizations whose employees "strongly agree" they do a great job of onboarding

12%
X

Luminaries
Consulting

New hires that feel fully equipped to excel in their role after onboarding

29%

X

Luminaries
Consulting

Get your sales team ramped up faster!

90 days **+** Sales cycle **=** Ramp up time

Luminaries
Consulting

Adjust based on **who/how** you're hiring

Company & Product Knowledge

Personal Effectiveness

Sales & AM Skills

Systems & Processes

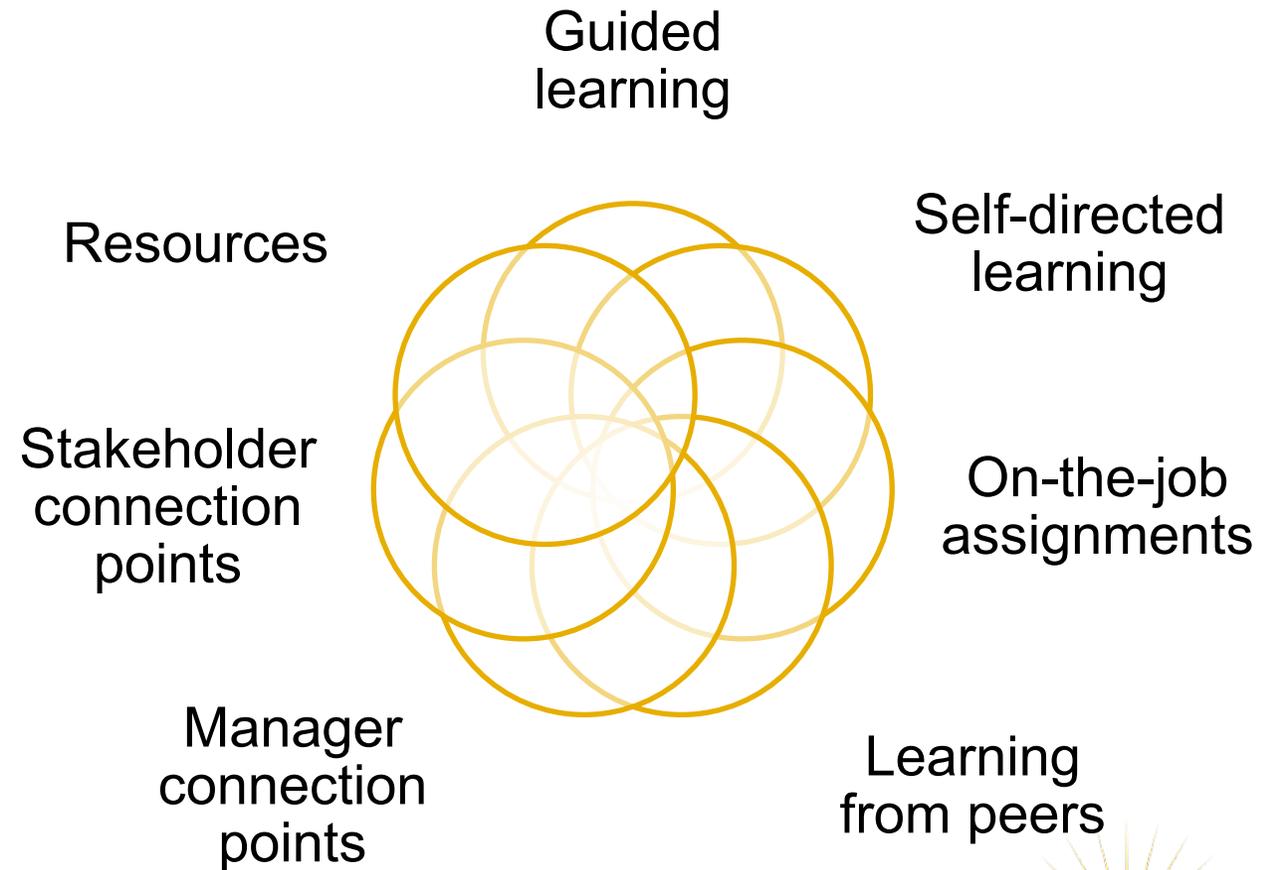Customer & Market Insights

Luminaries Consulting
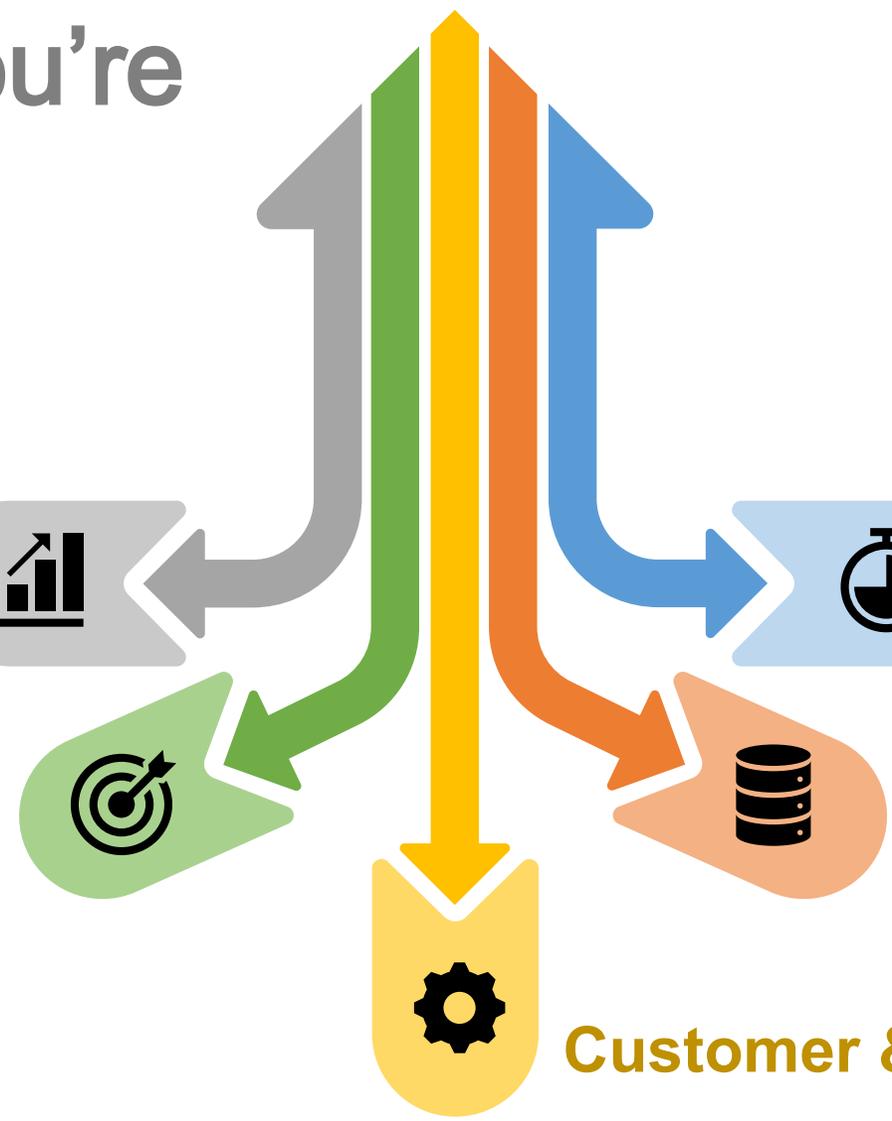
It doesn't have to be fancy to be effective

30, 60, 90 Roadmap

- ✓ Learning goals
- ✓ Performance goals
- ✓ Suggested activities

Guided learning

Self-directed learning

Resources

On-the-job assignments

Stakeholder connection points

Manager connection points

Learning from peers

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THE LEVEL OF THE TEAM RARELY, IF EVER, EXCEEDS THAT OF THE LEADER.

Mike Weinberg
Sales Management. Simplified

Luminaries Consulting

Don't miss this sweet spot

Sales Skills & Behaviors

Management Skills & Behaviors

Luminaries
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Performance consists of...

Results

measurable
outcomes
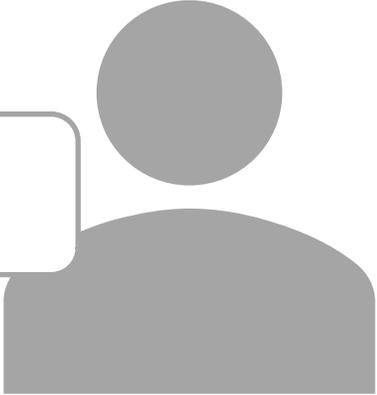
Manage

Behaviors

observable actions to
achieve results

Coach

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Coaching gets a bad rap

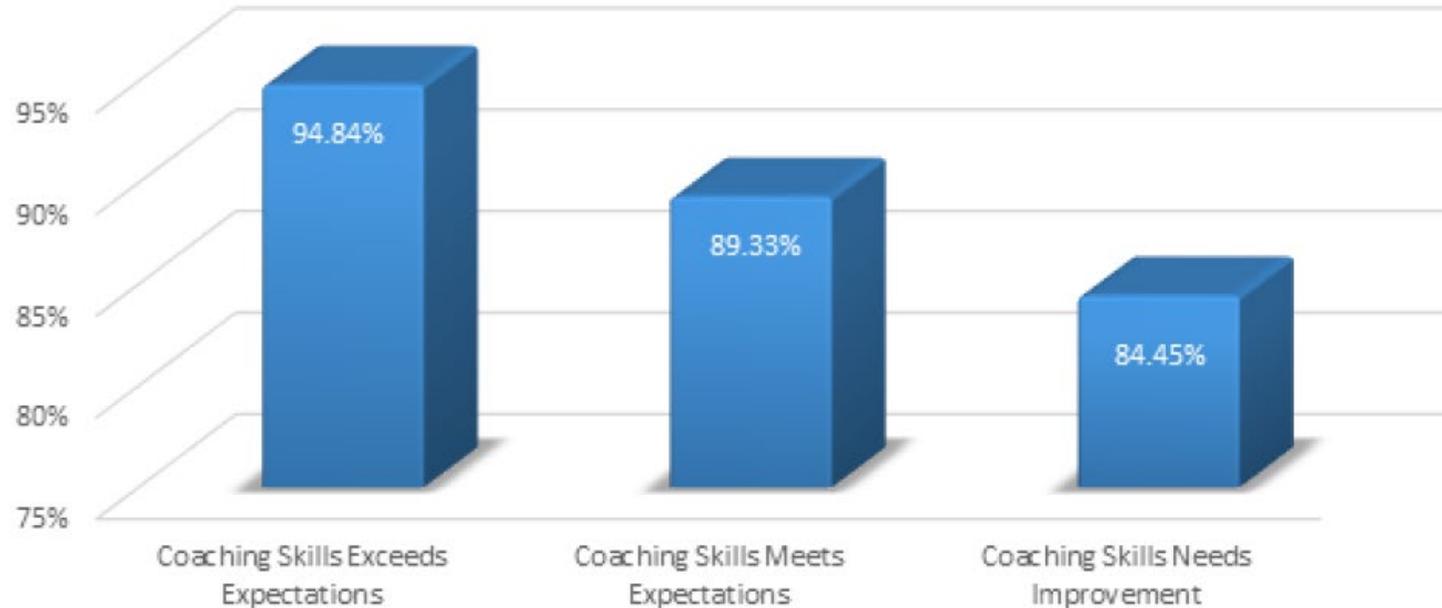This sounds like a coaching opportunity! Are you open to my coaching?

Ummm… sure.

When I was in your position, this is how I did it, so you should do it that way, too. Ok?
Great. Let's do more coaching soon!

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Coaching is about maximizing potential

Coaching for Performance – Level 1
© 2017 Performance Consultants International

Better coaching directly impacts results

Reps Achieving Quota

- Coaching Skills Exceeds Expectations: 94.84%
- Coaching Skills Meets Expectations: 89.33%
- Coaching Skills Needs Improvement: 84.45%

CSO Insights

Luminaries *Consulting*
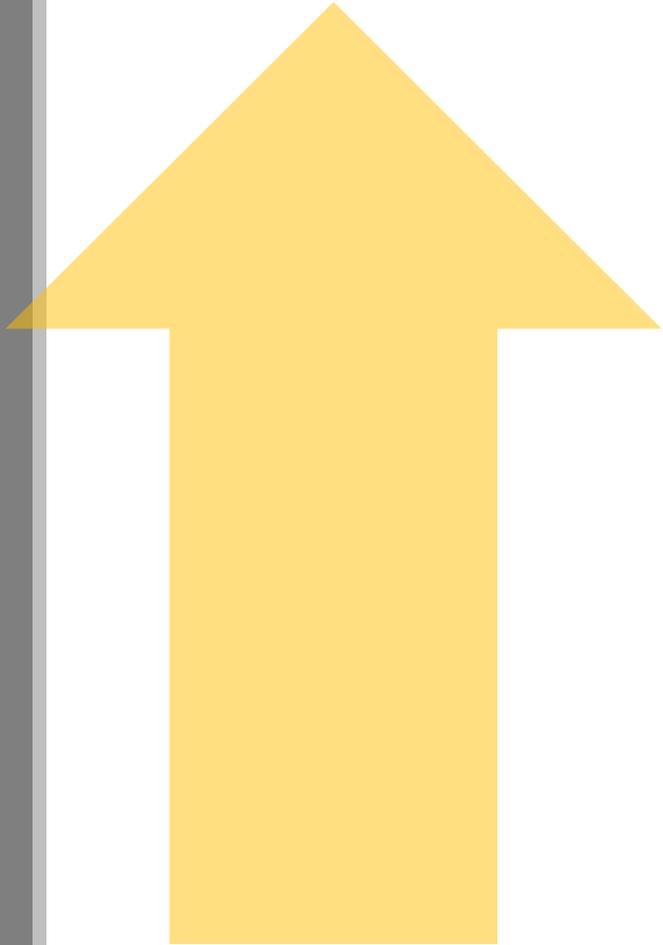
Today we'll cover...

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It pays to focus on existing growth

5x

25-95%

60-70%

5-20%

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Look at your current customer list:

- Which of these customers can you not afford to lose?

- Do you know what's being done to make sure that doesn't happen?

- Would other leaders in your organization answer those questions the same way you did?

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Your strategy, model, talent & processes should enable you to...

Get

Target and close the kinds of deals you want

Keep

Create strong relationships and execute the business so clients stay

Grow

Get out of maintenance mode and grow your wallet share

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The ACCOUNT DEVELOPMENT ASSESSMENT will help you to evaluate how your team is spending their time today vs. how you'd like them to.

How Do You Spend Your Time? — Luminaries Consulting

Step 1:
Think about a typical work week or month. What do you spend your time doing? Review the list and put a check mark next to those activities that you routinely perform. If it's helpful, circle the frequency.

Get — *frequency of activity*

- ☐ Prospecting / Get new customers (cold calling, social selling, etc.) *rarely -or- often*
- ☐ Research the market, the industry, and the competition *rarely -or- often*
- ☐ Realistically gauge an account's potential *rarely -or- often*
- ☐ Participate in conferences, networking events, etc. *rarely -or- often*
- ☐ Update the CRM (customer resource management) with sales activity *rarely -or- often*

Retain

- ☐ Build trust with customer & buyer *rarely -or- often*
- ☐ Identify what my customer & buyer values *rarely -or- often*
- ☐ Create or update standard operating procedures (SOPs) *rarely -or- often*
- ☐ Establish process improvements & opportunities for automation *rarely -or- often*
- ☐ Prepare for and conduct business reviews with customers *rarely -or- often*
- ☐ Evaluate existing relationships within the customer's organization *rarely -or- often*

Operationally Win

- ☐ Negotiate rates for current customer (bids, RFPs, pricing) *rarely -or- often*
- ☐ Track & trace, check calls, status updates *rarely -or- often*
- ☐ Solving customer problems (day-to-day) *rarely -or- often*
- ☐ Analyze and interpret account metrics/data/KPIs *rarely -or- often*
- ☐ Analyze account financials and/or forecasting *rarely -or- often*
- ☐ Draw insights from data and communicate to decision-makers *rarely -or- often*

Grow

- ☐ Conduct research on the customer *rarely -or- often*
- ☐ Identify ways to expand relationship within the customer's organization *rarely -or- often*
- ☐ Planned customer meetings (phone, virtual, face-to-face) *rarely -or- often*
- ☐ Talk with internal experts to understand our capabilities & capacity *rarely -or- often*
- ☐ Identify expansion opportunities (more shipments, locations, modes) *rarely -or- often*
- ☐ Provide & sell solutions / cross-selling *rarely -or- often*

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(Second page) You Spend Your Time? — Luminaries Consulting

the 4 areas. Thinking about how you typically spend your time, total your each area. What % of your time do spend in each? Be honest – there is no right rtunity for you to reflect.

f time spent in each area

- Get new customers
- Retain current customers
- Operational tasks with customer
- Grow business with customer

ur total should equal 100%.

u are spending your time today: Are you spending your time on the right activities leading to the desired results? Would you manager agree that you are n the right activities? How much time would you like to spend in each area?

me that I should spend in each area

- Get new customers
- Retain current customers
- Operational tasks with customer
- Grow business with customer

end more time doing? What do I need to do to make this happen?

end less time doing? Can I automate, delegate, or eliminate my time spent on this?
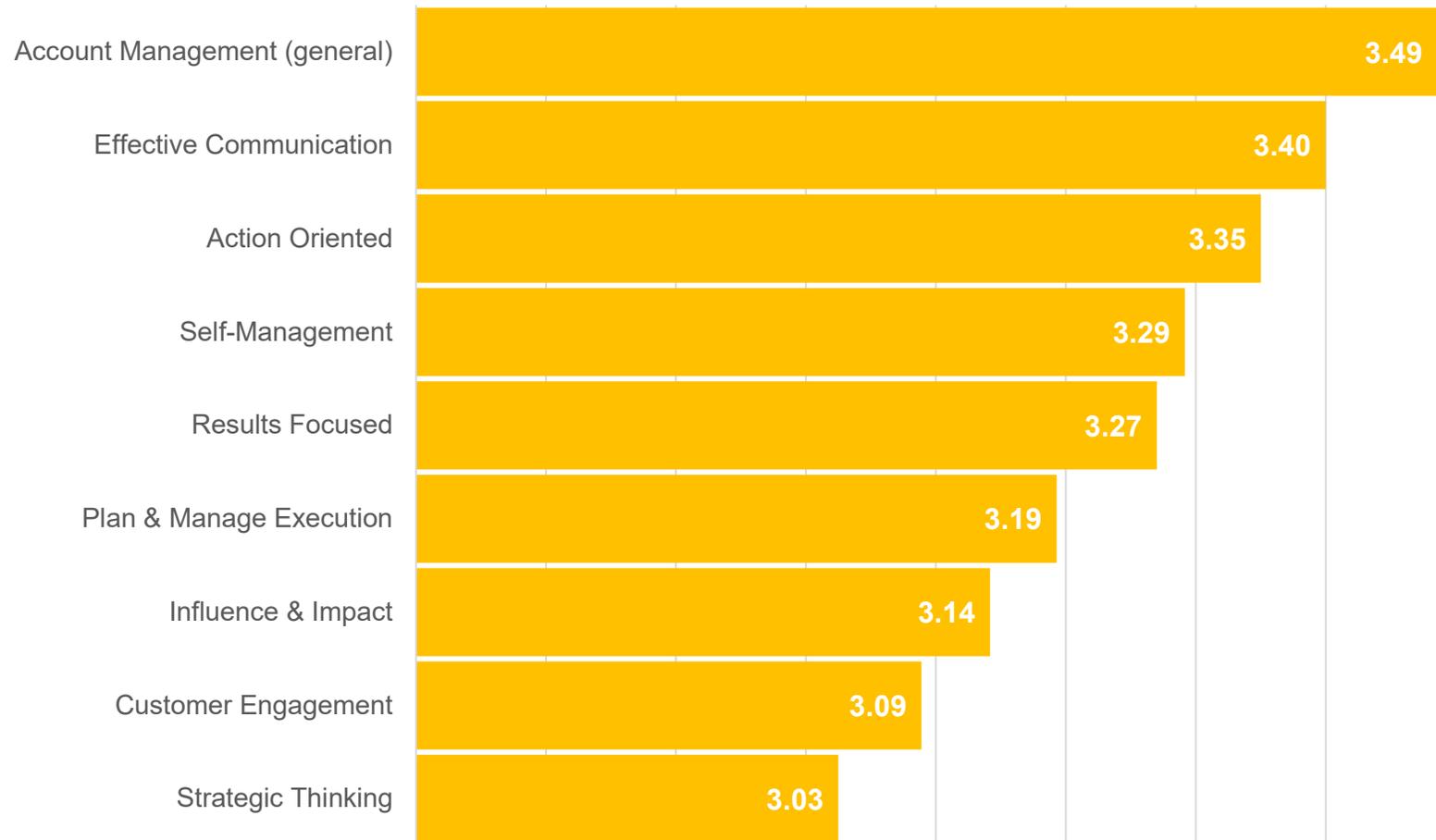
ing, LLC 2021

Create Account-Level Processes

- Type of talent
- KPIs
- SOPs
- Relationship levels
- Sales expectations
- Business review cadence
- Planning expectations

Expectations for Some

Expectations for All

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Tailor to team and individual needs

Category	Value
Account Management (general)	3.49
Effective Communication	3.40
Action Oriented	3.35
Self-Management	3.29
Results Focused	3.27
Plan & Manage Execution	3.19
Influence & Impact	3.14
Customer Engagement	3.09
Strategic Thinking	3.03

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Improved Performance Pipeline

MOTIVATION

I am willing to work towards change

INTEGRATION

I am able to incorporate these capabilities into my real life

Current

Future

INSIGHT

I know WHAT to change

CAPABILITY

I have the knowledge, skills & abilities needed

ACCOUNTABILITY

I have mechanisms in place to ensure I follow through

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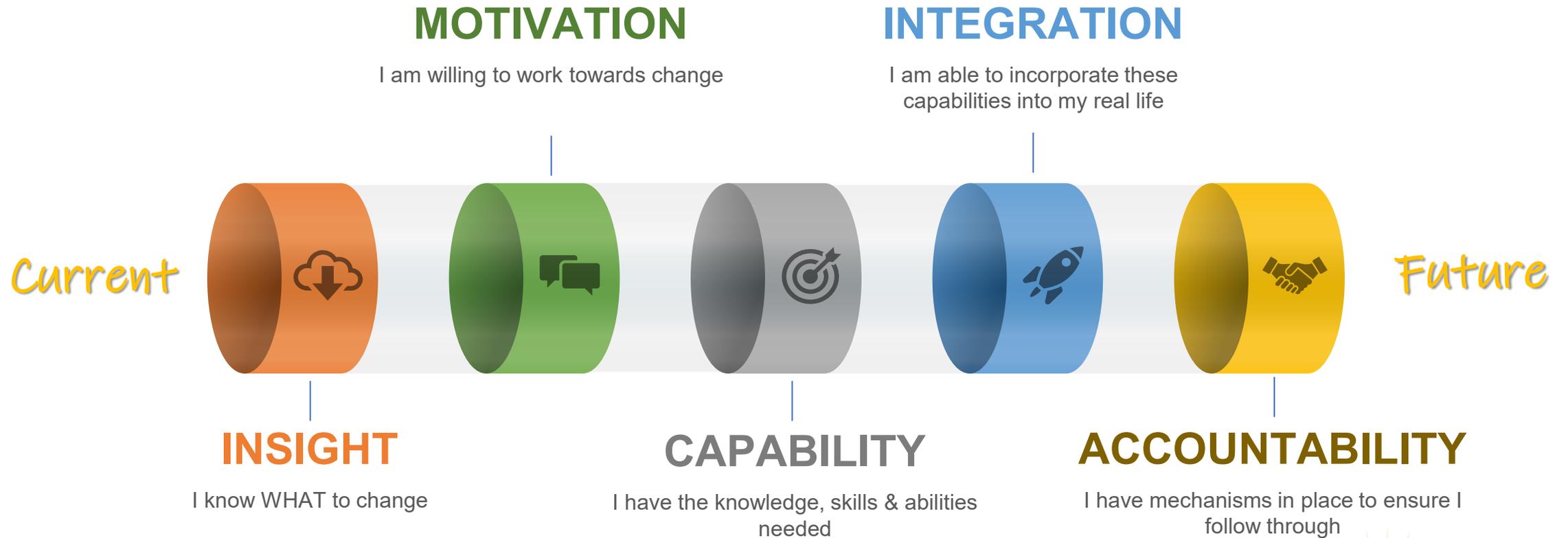
Need to get there faster?

Buy ──────────────────────── **Build**

| Purchase a general off the shelf solution | Purchase an industry-specific off the shelf solution | Collaborate with a partner on custom development | Build completely in-house |

Customization & investment →

Luminaries Consulting

What's one **actionable** **insight** from today?

We help logistics organizations get, keep, and grow their ideal clients

We specialize in…
- Logistics
- Sales
- Strategy
- Talent Development
- Change Management

Sara Black

Holly LaBoda

Luminaries Consulting