

Managing Sales Activity and Performance

June 1, 2011



Mechanical Service Contractors of America

MSCA

Webinar Series

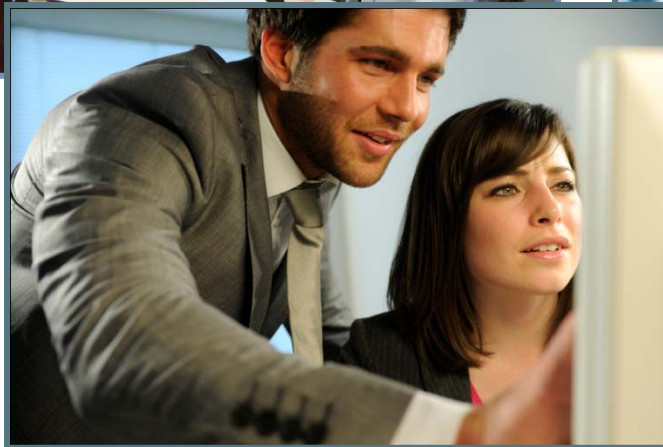


1 Paving the Way

2 The Path to Achieving Goals

3 Managing Sales Activity

Introduction



- *Dealing with different customer types*
- *Customer relations*
- *Day-to-day sales activities*
- *Closing sales*
- *Staying motivated*

Today's Presenters



David Bavisotto
Service Department Manager
Illingworth-Kilgust Mechanical
Milwaukee, Wisconsin



Wayne Turchetta
Vice President/Sales Manager
HMC Service Co.
Louisville, Kentucky

POLL – Your Company



1. What is the total annual revenue at your company including all departments?
 - ☐ Less than 1 Million \$'s
 - ☐ 1-3 Million \$'s
 - ☐ 3-5 Million \$'s
 - ☐ 5-10 Million \$'s
 - ☐ More than 10 Million \$'s

2. How many salespeople do you employ total for all departments?
 - ☐ 1-2
 - ☐ 3-5
 - ☐ 6-10
 - ☐ 11-20
 - ☐ More than 20

3. What are the annual service revenues at your company (service department only)?
 - ☐ Less than 1 Million \$'s
 - ☐ 1-3 Million \$'s
 - ☐ 3-5 Million \$'s
 - ☐ 5-10 Million \$'s
 - ☐ More than 10 Million \$'s

4. How many salespeople do you employ in service sales (service department only)?
 - ☐ 1-2
 - ☐ 3-5
 - ☐ 6-10
 - ☐ 11-20
 - ☐ More than 20

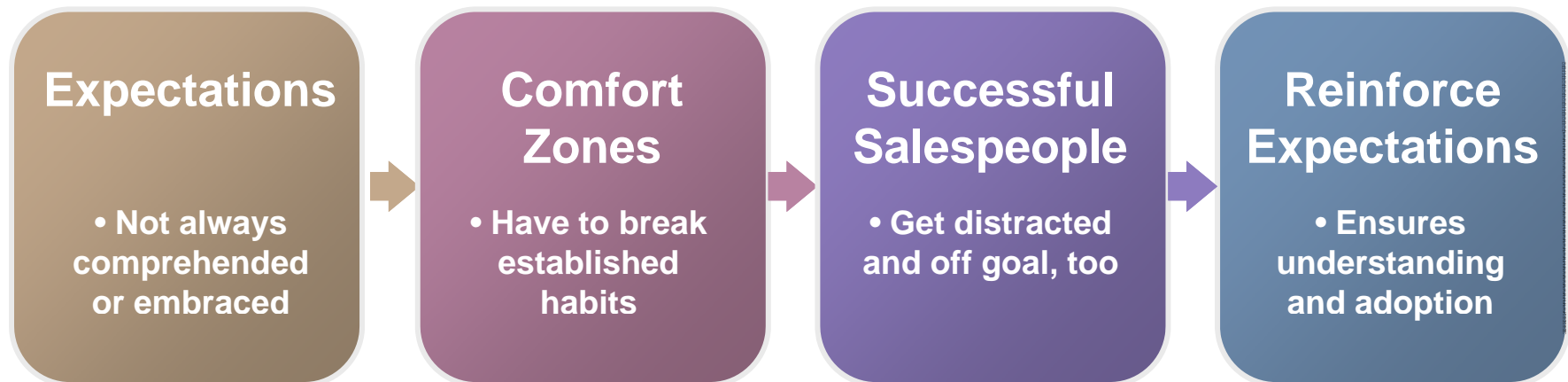
Role of Sales Management



Communicating Expectations



Why it's important to continuously communicate expectations.



Opportunities for Communicating Expectations



**Always Be
Communicating**

Without Good Job Descriptions



- Leads to misconceptions or poor understanding of the job
- Salespeople engage in busy work or “do their own thing”
- High potential new hires can easily go wrong



Job Description Basics



- Job title
- Position summary
- Key responsibilities
- Additional duties
- Department interactions
- Minimum qualifications
- Physical requirements
- Other requirements
- Disclaimer



Classifieds	
Employment	Job Listings
Resources	Location: Nationwide
Calculator	Function: Sales
Comparison	Company:
es for Sale	Job Title:

Offer Letters

- Job title and description
- Outline responsibilities
- Define general activities
- Set initial goals and time lines
- Define compensation and incentives
- Include acceptance sign-off



Main Offices:
1212 South Main Street
Irvine, CA 92602
Phone: 714.555.5555
Fax: 714.555.1555
www.bandymechanical.com

Jan 28, 2011

Mr. Edward C. Salesperson
1000 So. 100th Street
Greenfield, WI 53228

Subject: Employment Offer

Dear Edward,

We are pleased to offer you the position of **Service Sales Representative** within the Service Group of Bandy Mechanical. The **attached job description** explains this position further, but to summarize, **your job duties shall include** but not be limited to:

- Generating Sales Leads
- Sales and Estimating of New and Expansion of Existing Planned Maintenance
- Agreements
- Service Job Take-offs
- Developing and Maintaining Customer Relationships
- Identifying new work opportunities for all IKM business units

While this position shall include selling service related projects it is anticipated that additional sales potentials and sales leads will be generated for other divisions within the Illingworth-Kilgust structure in the course of your sales efforts. Although you may not be responsible for the actual takeoff, technical proposal, or sale in these cases, **generating leads for other departments** is an important additional role as part of the sales team and is an expectation of management for this position.

The **compensation and benefits** package in this offering shall include:

- Annual base salary \$XX,000.00 plus commission (**see attached plan**)
- Week's vacation
- Monthly Car Allowance of \$600 plus \$0.10 per Company Driven Miles
- Company Provided Cell Phone
- Company Provided Laptop Computer
- 401K
- Health and dental insurance
- \$200 monthly Additional if Company Provided Insurance is declined
- Paid Holidays

We are pleased to offer this opportunity to you and are excited to have you join our team. We would like a commitment of acceptance by 02/15/11, with an expected start date to be determined based on your current job responsibilities. Please review this offer and if acceptable, **sign and return the enclosed acceptance form** indicating your agreement with terms of this offer. Feel free to call me with any questions or concerns that you may have.

Sincerely,

David Bavisotto
Service Department Manager



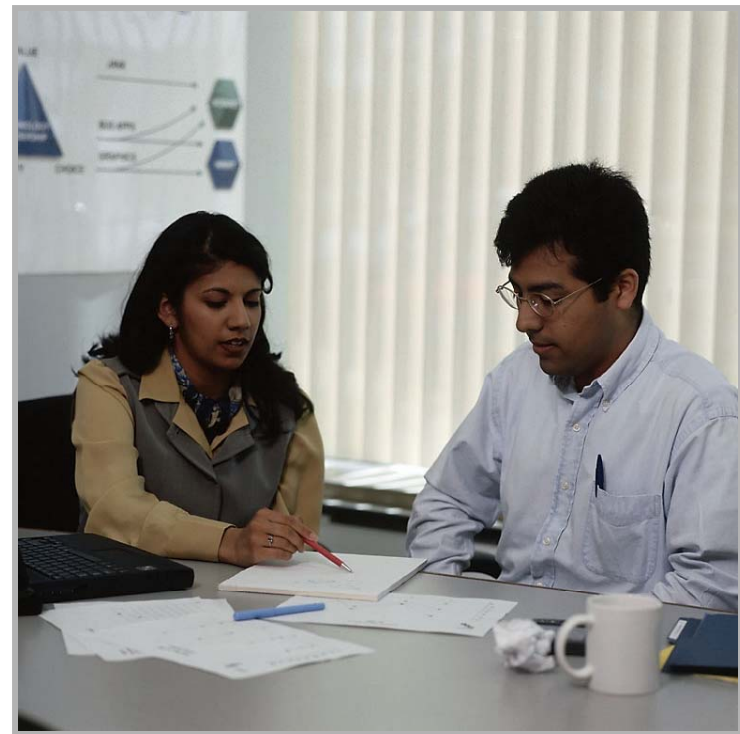
Sales Incentive Plans



Incentive Plan Meetings



- Defines actual goals
- Clarifies misunderstandings
- Gain mutual agreement



Status Meetings



- Weekly
- Monthly
- Quarterly



*Shows by actions and results
how effectively they understand the expectations.*

Typical Status Meeting



- Success Stories
- Call Activity
- PMA
 - Bid activity/acquisition
- Small project work
 - Bid activity/acquisition
- Customer Relationships
- Network Opportunities/Outings
- Education/Training
- Operations Interface
- Good of the Order

Weekly Service Sales Team Meeting Agenda



Mentoring Sessions



- Formal and informal
- Show by example
- Eliminate misunderstandings
- Address problems or bad habits



Performance Reviews



- 30, 60, or 90 day review for new hires
- Semi-annual or annual for others
- Shouldn't be any surprises
- Motivating opportunity for career development



Tracking Sales Activities



- Tracking progress is essential to success
- Many metrics useful to monitor
- Start with weekly call sheet basics
 - Cold calls
 - Appointments
 - Proposals/bids
 - Closed Sales



“Trust, but verify.”

Tracking Sales Activities



- More advanced factors or metrics to consider:
 - Maintenance customer retention
 - Customer satisfaction survey results
 - Retention activities
 - Actions to recover cancellations
 - Profitability measures
 - Billing practices and pre-billing strategies
 - Forecasting hours and staffing needs

Tracking Sales Activities



- Other possible performance indicators
 - Sales cycle time
 - Referrals received and closed
 - Proposals presented/awarded
 - Email and/or direct mail sent to prospects
 - Number of contacts prior to sales close
 - Time spent on non-sales activities
 - Up-selling attempts and successes
 - Business cards distributed
 - Average sales and margin per account

Activity Reports



NAME:	Wayne Turchetta		WEEK ENDING	3-Jun-11	
Date	Customer	Contact Person	Phone	Type Call	Comments
					1
					2
					3
					4
					5
					6
					7
					8
					9
					10
					11
					12
					13
					14
					15
					16
					17
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					23
					24
					25
					26
					27
					28
					32
					33
					34
					35
					36
PAGE	ONE	OF			20 Cold Calls - 10 Face to Face w/EXISTING Customer Weekly
Code: SS: Site Survey; MWO: Meeting with Owner; MWT: Meeting with Technician; OM: Office Meeting;					
CC: Cold Call; FCC: Follow Up Cold Call					

Activity Reports



	Customer Name	Contact	Phone	Notes/ Results/ Meetings	Date/ Time	Next Step
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
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22						
23						
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25						
26						
27						
28						
29						
30						
31						
32						
33						
34						
35						

Activity Reports



BID ACTIVITY LOG																				
TEAM	RON	PROJECT ANALYSIS		CUSTOMER TYPE		BID TYPE		ACTIVITY TYPE												
26	67	PMA'S BID	149% COMMERCIAL	0% T & M	60%	#VALUE! PM AGREEMENTS														
17	37	PMA'S AWARDED	22% MANUFACTURING	92% LUMP SUM	40%	#VALUE! PROJECT WORK														
65%	55%	PMA HIT RATIO	0% INSTITUTIONAL	0% BUDGET	0%	#VALUE! REPAIR														
2	44	PROJECTS BID	0% BEVERAGE/FOOD	7% NTE	AVERAGE AWARD SIZE															
14	29	PROJECTS AWARDED	0% INTERNAL	BID STATUS																
700%	66%	PROJECT HIT RATIO		69% OPEN									\$ -	PM AGREEMENTS						
51	0	REPAIRS BID		0% LOST									\$ -	#DIV/0! PROJECT WORK						
33	0	REPAIRS AWARDED		102% AWARD									\$ -	#VALUE! EQUIPMENT REPAIR						
65%	0%	REPAIR RATIO		0% CANCELLED																
DATE SENT	CUST TYPE	CUSTOMER DETAILS	BID NUMBER	BID STATUS	BID TYPE	ACTIVITY TYPE	QUOTED VALUE	PMA AWARD		PROJECT AWARD		REPAIR AWARD								
RUNNING TOTALS :							\$ 878,638	\$ 56,877		\$ 210,022										
4-19-2011	c	Glenroy Drive House PM#4783		open	LS	PMA														
4-20-2011	c	Hoffman Loomis RTU#1 SF Bearings		award	LS	PRO	\$ 2,180			\$ 2,180										
4-20-2011	c	Merge (Amicas) PM#4573 Full		award	LS	PMA														
4-22-2011	c	First Congretional PM#4628		open	LS	PMA														
4-22-2011	c	Mcadams Graphics PM#4741		award	LS	PMA														
4-22-2011	c	Poplar Creek PM#4952		open	LS	PMA														
4-27-2011	c	Mayfair DigestiveHC LLC PM#4692		award	LS	PMA														
4-27-2011	c	SSSF Server room AC		award	LS	PRO	\$ 5,450			\$ 5,450										
4-28-2011	c	St Joes Cong. Boiler Reset Control		award	LS	PRO	\$ 1,296			\$ 1,296										
5-3-2011	c	Manpower Office PM		open	LS	PMA	\$ 910													
5-5-2011	c	Satisloh 3 new thermostats		award	LS	PRO	\$ 1,152			\$ 1,152										
5-6-2011	c	Dana Repairs 5-6-2011		award	LS	PRO	\$ 2,500			\$ 1,147										
5-9-2011	c	Aldi Mitsi Server AC		open	LS	PRO	\$ 9,254													
5-10-2011	c	Amcor Boiler repair		award	NTE	PRO	\$ 5,000			\$ 5,000										
5-10-2011	c	Hoffman 76th Street Evap Leak		award	NTE	PRO	\$ 6,000			\$ 6,000										
5-12-2011	c	Kohler Aerco Steam Water Heater		open	LS	PRO	\$ 16,960													
5-13-2011	c	SSSF Lower Level Addition		award	LS	PRO	\$ 8,130			\$ 8,130										
DAVE RON RICH MIKE SHEET SHEET2 SHEET3 TOTALS																				

Activity Reports



SERVICE LOG SUMMARIZATION: QUANTITIES

	<u>NOVEMBER</u>	<u>DECEMBER</u>	<u>JANUARY</u>	<u>FEBRUARY</u>	<u>MARCH</u>	<u>APRIL</u>	<u>MAY</u>	<u>JUNE</u>	<u>JULY</u>
PMA'S BID	0	0	3	3	11	5	4	0	0
PMA'S AWARDED	0	0	4	3	6	2	2	0	0
PMA HIT RATIO	0 %	0 %	133.33 %	100.00 %	54.55 %	40.00 %	50.00 %	0 %	0 %
PROJECTS BID	0	0	0	1	1	0	0	0	0
PROJECTS AWARDED	0	0	5	2	6	1	0	0	0
PROJECT HIT RATIO	0 %	0 %	#DIV/0!	200.00 %	600.00 %	#DIV/0!	0 %	0 %	0 %
REPAIRS BID	0	0	12	11	16	10	2	0	0
REPAIRS AWARDED	0	0	8	8	12	5	0	0	0
REPAIR RATIO	0 %	0 %	66.67 %	72.73 %	75.00 %	50.00 %	0 %	0 %	0 %

SERVICE LOG SUMMARIZATION: DOLLARS

	<u>NOVEMBER</u>	<u>DECEMBER</u>	<u>JANUARY</u>	<u>FEBRUARY</u>	<u>MARCH</u>	<u>APRIL</u>	<u>MAY</u>	<u>JUNE</u>	<u>JULY</u>
PMA DOLLARS BID	\$0	\$0	\$41,144	\$3,888	\$22,626	\$15,950	\$25,350	\$0	\$0
PMA DOLLARS AWARDED	\$0	\$0	\$3,476	\$330	\$1,250	\$0	\$0	\$0	\$0
PMA DOLLARS HIT RATIO	0 %	0 %	8.45 %	8.49 %	5.52 %	0 %	0 %	0 %	0 %
PROJECT DOLLARS BID	\$0	\$0	\$71,660	\$33,143	\$65,905	\$19,330	\$13,900	\$0	\$0
PROJECT DOLLARS AWARDED	\$0	\$0	\$11,750	\$2,965	\$29,405	\$5,400	\$0	\$0	\$0
PROJECT DOLLARS HIT RATIO	0 %	0 %	16.40 %	8.95 %	44.62 %	27.94 %	0 %	0 %	0 %
REPAIR DOLLARS BID	\$0	\$0	\$23,178	\$22,493	\$35,254	\$24,892	\$7,285	\$0	\$0
REPAIR DOLLARS AWARDED	\$0	\$0	\$12,273	\$15,250	\$28,168	\$15,127	\$0	\$0	\$0
REPAIR DOLLARS HIT RATIO	0 %	0 %	52.95 %	67.80 %	79.90 %	60.77 %	0 %	0 %	0 %

Avoiding Inter-office Friction



SITE SURVEY FOR PM AGREEMENT

Customer: _____
Jobsite location: _____ Date: _____

Approximate distance from office _____ miles
Hose bib location (water to clean coils) _____ feet

Security concerns:

Card or Key access:	Yes []	No []
Security assist:	Yes []	No []
Vehicle Inspection (Jails):	Yes []	No []
Check point (UPS):	Yes []	No []

Accessibility to roof:

Need 24' ladder	Yes []	No []
Need 40' ladder	Yes []	No []
Roof hatch	Yes []	No []
Second person required:	Yes []	No []
Security or Key access:	Yes []	No []

Filters:

Size and quantity list attached:	Yes []	No []
Special Size Filters:	Yes []	No []
Can filters be stored on site:	Yes []	No []

Belts:

Size and quantity list attached:	Yes []	No []
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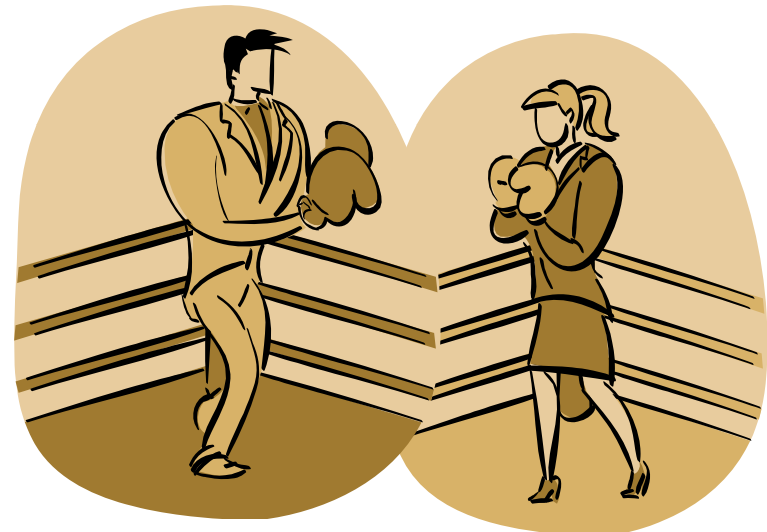
PM Working Hours:

Normal Business Hour	Yes []	No []
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Parking:

Near facility	Yes []	No []
Pay to park	Yes []	No []

Comments regarding downtime, second person, travel, security, after hour labor requirements, over night expenses etc.



Sales versus Operations?

Avoiding Inter-office Friction



Service Agreement First Visit Checklist

Objective

To enhance clear communication between service department personnel and customer representatives.

Scope

To be filled out by the salesperson that sold the Preventative Maintenance Agreement.

Procedure

The salesperson should accompany the Service Technician on the first inspection to introduce the customer to the technician. At this time the salesperson will establish with the customer any special requirements, etc. and record them on this form. The form will be turned in to the Service Coordinator for inclusion in the PMA folder.

Date: _____

Agreement No. _____

Those in attendance: _____

1. Explain the purpose of this visit.

2. Determine where job documents can be stored.

2a. Is job box to be installed? Yes _____ No _____

3. Determined where parts can be stored.

4. Determined procedure for working in the building:

4a. During the day:

Sign in _____
Notification _____
Parking _____

4b. After working hours:

Sign in _____
Notification _____
How to gain access _____

5. Determined the procedure for gaining access to restricted areas; mechanical room, roof, offices, computer rooms, etc.

6. Customer contacts:

Name: _____

Telephone: _____

7. Contractors we may have to contact in an emergency:

Plumber _____

Phone _____

Electrician _____

Security _____

Service Agreement First Visit Checklist, continued

8. Determine who should sign the service report:

_____ or _____

9. Set up communication procedures with building personnel for reporting both emergency and routine trouble calls.

10. Determine critical areas of building, operating hours, and do's and don'ts regarding shut down equipment for maintenance.

11. Determine any current problems:

12. Review tasking sheets and set date for completing the tasking

12a. Tasking complete by: _____

13. Prepare a list of items requiring attention that are not covered in the agreement, maintenance as well as projects.

14. Determine what drawings and other documents are available and where they are.

15. Cold weather will not permit start-up & verification of Air-Conditioning equipment operating condition. Start-up will be performed on or about _____ (date) and the need for billable repairs, if any, will be determined at that time.

16. Hot weather does not permit operation checkout of heating equipment. This will be done on or about _____ (date) and the need for billable repairs, if any, will be determined at that time.



Sales and Operations...

Exceeding Customer Expectations



HMC Service Company Customer Survey

Dear Valued Customer: In an effort to assure HMC Service Company is providing the service that is expected from our customers, we would greatly appreciate your input to the questions listed below.

For each of the following statements about HMC Service Company, please indicate whether you:

strongly disagree (1); somewhat disagree (2); Neither Disagree or Agree (3); somewhat agree (4); strongly agree (5).

We meet your deadlines for PM inspections:	1	2	3	4	5
We meet your deadlines for repair service:	1	2	3	4	5
We provide fast turnaround for quotes:	1	2	3	4	5
We provide fast turnaround for emergency service:	1	2	3	4	5
We are easy to do business with	1	2	3	4	5
We deal with issues or problems openly and quickly:	1	2	3	4	5
Our company is helpful in providing options to your problems:	1	2	3	4	5
Our employees are accessible :	1	2	3	4	5
Our employees listen to what you have to say:	1	2	3	4	5
Our technicians keep you informed about your equipment:	1	2	3	4	5
Our technicians take ownership and responsibility of your equipment:	1	2	3	4	5
Our technicians are thorough in their approach to servicing your equipment:	1	2	3	4	5
We let you know we greatly appreciate your business:	1	2	3	4	5

If you were president of HMC Service Company what changes would you make to better improve the level of service to our customer, and why.



Exceeding Customer Expectations



Customer Survey

QUALITY ASSURANCE PROGRAM

Customer Name: _____

Technician on Site: _____

Initial Greeting:

Hello, my name is _____.

I am with the _____ service department. I would like to conduct a very brief customer assurance survey.

The survey is only 12 questions and should only take a few minutes. May we please proceed?

I am calling as a follow-up to work recently performed by our service technician _____.

- Definition of Terms:
- 5 Outstanding – Performance of high caliber
 - 4 Above Average – Performance at a fully satisfactory level
 - 3 Average – Performance meets required elements of the job
 - 2 Below average – Performance does not consistently meet acceptable; needs improvement
 - 1 Unsatisfactory – Expectations are not being met

1. Did the Service Technician check in and out with you?

Yes No N/A
Comments: _____

2. Did the Service Technician explain what repairs were performed and make any necessary recommendations before he/she left?

1 2 3 4 5
Comments: _____

3. Are you happy with the service performed?

1 2 3 4 5
Comments: _____

4. Overall performance of our staff and services delivered?

1 2 3 4 5
Comments: _____

5. Professionalism and teamwork of our employees?

1 2 3 4 5
Comments: _____

6. Technical Knowledge?

1 2 3 4 5
Comments: _____

7. Response to emergencies, work changes or problems?

1 2 3 4 5
Comments: _____

8. Information (service reports, proposals, accurate invoices, project reports)?

1 2 3 4 5
Comments: _____

9. Overall value of company services?

1 2 3 4 5
Comments: _____

10. Overall responsiveness to your needs?

1 2 3 4 5
Comments: _____

11. Do you have any needs or concerns we should be aware of at this time?

Yes (Please describe) No N/A
Comments: _____

12. Is there anything we can do to improve our service to you?

Yes (Please describe) No N/A
Comments: _____

CLOSING: Thank you very much for your time. We appreciate your feedback.

Survey conducted by _____
Signature

Accepted/Reviewed by _____
Signature

What do our customers think?



Sales Automation Tools



GoldMine. 

 amcrm®

Sage ACT!

 salesforce

 Salesnet®
Sales Process Experts

 SUGARCRM®

 Microsoft
Dynamics CRM

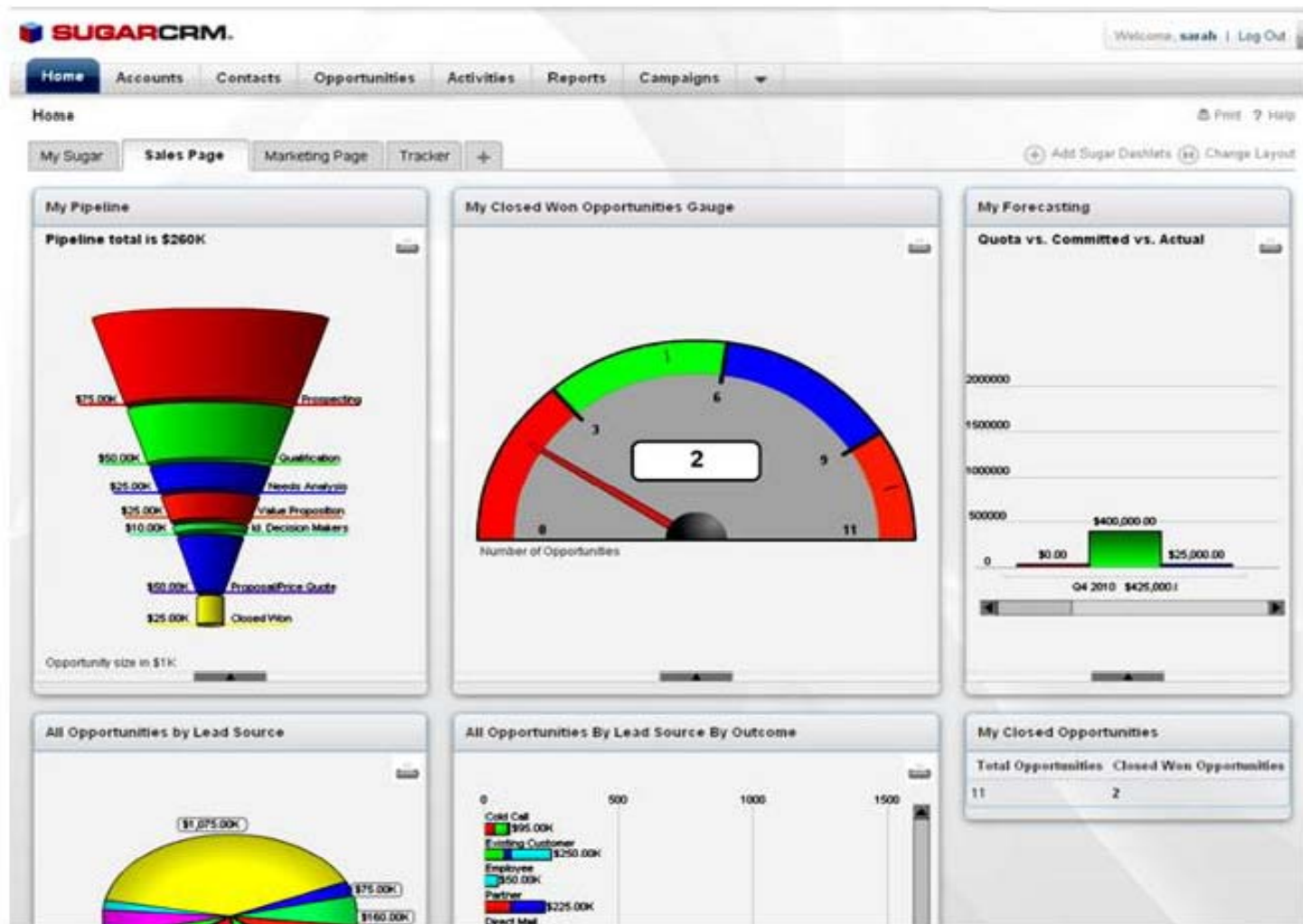
Benefits of Sales Automation Tools



- All prospect info in one place
- Monitor stages of sales process
- Coordinate sales across organization
- Facilitate account handoff
- Faster status reports
- Create key performance indicators
- Help salespeople become more organized and efficient



Using CRM to Manage Sales



Using CRM to Manage Sales



Close Save Delete Add Activity to my Calendar Clear Activity Details Create Related Activity

Enquiry

Overview | Bid/Proposal Details | Project Contacts | Project Profiling | Analysis | Related Activities | Document Security

Owner *	ABC Mechanical		
Opportunity/Project Title	└┐		
Primary Related Company	Xpedx	Primary Classification	▾
Primary Related Contact	Lori Holbrook	Secondary Classification	▾
Account Manager	Tracy Bethhauser	Current Bid/Proposal Value	

Proposal & Mailing Template Special Purpose Fields

Letter Salutation	└┐	Letter Signoff	└┐ Yours Faithfully └┐
Sender Name	Tracy └┐	Sender Telephone	└┐
Sender Title	Account Manager └┐	Sender Cell Phone	└┐
Sender Company	└┐	Sender Fax	└┐
Sender Company Website	└┐	Sender Email	└┐

Add Notes/Comments

Notes/Comments

└┐ 12/02/2008 10:41:20 AM Tracy: t/t Lori, she reiterated that she has been there for about a year now and is trying to get things organized. She decided to stay with the contractor that the company was using - Jacklyn - she said they came in and corrected the controls issue from their install and that she was not very pleased with the service she has gotten but that they were working through it. Said she would keep us in mind if she were to change service providers. Said we could get together after the holidays to discuss possibilities for 2009.

8/12/2008 Tracy: John B and I met with Lori 2nd wk of Aug. We toured facility and took an inventory of the equipment. Discussed needs and issues, Lori is new to position, wants to get her feet under her on what she needs to do and the bldg needs and will keep in touch with us. Agreed for us to offer her a proposal. Met again and presented proposal. Lori said she would let us know. Asked us about the current system and it's controls, did not know how to get her bldg running at the right temp. John B and I reviewed that the controls were probably on her computer and to t/t her IT guy to follow up on it. Told her to let us know if we could help her at all. If/u w/ Lori several times through the end of October, she thanked us for the info on the controls and said she would think about us doing the PM's. I asked if she was the decision maker or if we should meet and review with her and anyone else and Lori said she was and just wasn't ready to make a decision yet. Check back again at a later date, see if anyone is doing the work and she just doesn't want to change or ? - call again.








└┐

File Attachments etc

Using CRM to Manage Sales

2011 Compare Best Contact Management Software

TopTenREVIEWS | Software | Business | Contact Management Software Review

Rank	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10
	Salesforce	Oncontact	Sage ACT!	Prophet	AlMcrm	Relenta	Maximizer CRM	webAsyst	Chaos Intellect	Contact Plus
										
Reviewer Comments	READ REVIEW	READ REVIEW	READ REVIEW	READ REVIEW	READ REVIEW	READ REVIEW	READ REVIEW	READ REVIEW	READ REVIEW	READ REVIEW
Lowest Price	BUY \$125/mo.	BUY \$59/mo.	BUY \$174.99	BUY \$29/mo.	BUY \$55/mo.	BUY \$25/mo.	BUY \$199.00	BUY \$149.00	BUY \$59.95	BUY \$199.00
Overall Rating	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
Ratings										
Features	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
Contact Information	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
Sales & Marketing Tools	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
Ease of Use	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
Help & Support	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★	★★★★
View Specifications	Go!	Go!	Go!	Go!	Go!	Go!	Go!	Go!	Go!	Go!
View Screenshots										
Features										
Email Integration	✓	✓	✓	✓	✓		✓	✓	✓	✓
Web Hosted Solution	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Mobile Access	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Daily Schedule/To-Do List	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Contact/Account Notes	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Calendar Integration	✓	✓	✓	✓	✓		✓	✓	✓	✓
Remote Synchronization	✓	✓	✓	✓		✓	✓	✓	✓	✓
Dialing Capabilities	✓	✓	✓	✓	✓				✓	✓
On-Premise Solution		✓	✓	✓			✓		✓	✓

POLL – Sales Tools



1. What primary method do your salespeople use to keep track of their customers and sales activities?
 - ☐ Hand written records or notes
 - ☐ Excel spreadsheets
 - ☐ Stand-alone CRM software on the salesperson's PC
 - ☐ Company-wide networked CRM
 - ☐ Other software or tools

The Sales Activity Drill

- Target markets and customers
- Find leads in those areas
- Qualify potential customers
- Cold call
- Set appointments
- Create bids and proposals
- Follow-up
- Customer appreciation and maintenance



Bottom Line: Salespeople must be PROACTIVE!

Obstacles to the Drill



- No plan for success
- Being opportunistic
- Cold call reluctance
- Not organized
- Not using automation tools
- Too busy to follow up



Marketing Programs



- Ineffective HVAC marketing
- Can be a key resource
- Sales Managers should take actions to get marketing benefits for sales



POLL - Marketing



1. Does your company have a marketing department or marketing resource?
 - ☐ Yes
 - ☐ No

2. What kinds of marketing activities do you think are/would be the most help in your selling efforts? (check all that apply)
 - ☐ Advertising
 - ☐ Web site
 - ☐ Social media
 - ☐ Promotional literature
 - ☐ Trade shows
 - ☐ Testimonials
 - ☐ Other

Implementing a Marketing Program



- Marketing activities Sales Managers can influence
 - Sales benefits from web site
 - Press releases
 - Success stories and testimonials
 - Participate with trade shows and industry organizations
 - Seminars, articles, speaking engagements
 - Utilize social networking sites



Keeping Salespeople Motivated



- Starts with an effective incentive plan
- Inspiring leadership
- Responsive to problems and obstacles
- Recognition for achievement
- Short term contests and SPIFFs to renew enthusiasm
 - Weekend getaway
 - Gift cards
 - Day at the races



Why Good Sales Teams Fail



The sales manager hasn't developed the right skills needed to effectively communicate expectations, manage, and motivate the sales team to reach their goals.

Sales Management Competency Requirements



- Skilled at keeping salespeople focused on goals
- Empower sales staff
- Reading salespeople for strengths and weaknesses
- Coaching and mentoring ability
- Able to run effective meetings
- Knowing how to hire well and when to fire
- Motivating salespeople to do the drill and ask for the order



*“Salespeople develop accounts;
sales managers develop salespeople.”*

Today's Wrap-up



- Good sales management is key to success
- Manage, motivate and continually communicate expectations
- Many opportunities for communicating
- Tracking provides performance feedback
- Tools, forms, and resources help everyone
- Must develop right skills to do the job well



Future Webinars



To register for future programs
<http://msca.webex.com>

- Paving the Way – February 9**
What makes a sales manager effective
Identifying sales management priorities
- Goal Setting – April 13**
Setting goals and sales plans
Compensation
- Sales Activity – June 1**
Type and frequency of activities
How to monitor performance
- Training – August 10**
The 9-box training matrix
Training by skill and service sold
- Coaching – September 28**
How to coach salespeople
Adapting to different levels of experience
- Best Practices – December 7**
What other companies are doing
Resources of interest to sales managers

Questions & Answers



What questions do you have?

For Further Information



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Thank You!



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