



Combining Virtual & Face to Face Sales for Maximum Results

Takeaway Action Plan



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Takeaway #1 **EVERYBODY is responsible for sales.**

From the Board Room to the teller line, everyone must understand their role in the sales process. An "opportunity finder" mindset must be adopted.

ACTION STEP:

Expectations must be set with everyone. They must be held accountable to these expectations but must also be incented for meeting these expectations. Training is a key component to this first takeaway. This is critical for the long term success of your culture.



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Takeaway #2
Business Development & Sales are NOT the same thing.



Business Development is the process of finding opportunities. Sales is the process by which opportunities are qualified and brought to closing. Each has a different skill set and a different process.

ACTION STEP:
Define those activities and employees that are responsible for business development and those that are responsible for sales. You will need to create a process through which each operate. A well defined process ensures that all employees are behaving in a method that promotes success & is consistent with your organizational mission & message.



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Takeaway #3
You need a Quarterback.

Every sales organization needs a point person. Someone who understands the process, the mission & can break down the silo's that can often cause a culture to stall. Far too often, this very important task is given to an individual because of title or longevity. This is a mistake.

ACTION STEP:
Determine who internally can help drive this culture. If you come up empty, go outside of the organization to find them. Hire them a good coach (There's no Brady without Belichick). This individual must be given authority to manage and drive all aspects of your sales culture including some level of oversight & review of all "sales team:" members.



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Takeaway #4
Lack of sales
accountability kills
Marketing success.

The #1 reason marketing driven opportunities fall through the cracks is a lack of "Sales team" accountability. Without a standardized process in place for handling these leads, Marketing initiatives will continually rely on pricing and product to drive results.

ACTION STEP:
 Work with your "Quarterback" to define a process for handling leads. Make sure that "sales team" members fully understand what your expectations are and also understand the initiative and the messaging. Your QB must be willing and able to hold sales team members accountable.



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Takeaway #5
You MUST meet
regularly.

Your sales team, including marketing and key members of senior management must meet regularly (no less than monthly) to strategize, measure & track progress. This also helps foster the culture of "opportunity finding" referenced in takeaway #1.

ACTION STEP:
 Get it on your calendar immediately. Make sure the meeting happens regardless of vacations or sick days. An "around the table" general discussion should include previous successes, current activities, organizational initiatives & open discussion. Your QB should facilitate the meeting and no one present should be able to opt out of the discussion.



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