



# 7 Steps to Create a High Performance Sales Team

A sales management guide  
to accelerate the  
revenue engine  
in your business

Author:  
**Stuart Ayling**

## **7 Steps to Create a High Performance Sales Team**

by Stuart Ayling

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### **Who is this management guide for?**

I have written this report to help sales leaders and managers in companies that employ technically-oriented staff who have a dual responsibility of delivering their technical knowledge or professional expertise and who also need to sell, to win new business. This includes anyone who has a particular area of technical or professional expertise such as engineers, consultants, scientists, technical support, product specialists, advisers, professional services and those who sell technical products.

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## Introduction

If you are responsible for managing the team that brings in new work (what I call the 'revenue engine' of your business) this guide is written for you.

Just to be clear, for businesses that sell services or technical/industrial products your revenue engine is your team of:

- Technical specialists
- Professionals
- Advisors
- Consultants
- and of course, those in a Business Development role

These people are your revenue engine because they have regular contact, specialist knowledge, and trusted relationships with clients; they have the potential to recognise and pursue new business opportunities.

Even if you don't want your team to be 'slick sales people', you probably need them to be more proactive and determined in winning new business.

### **Your revenue engine drives sales growth**

The message I am sharing here is relevant for businesses in fields such as:

- Industrial, medical and technical products
- Professional and advisory services
- Design, engineering and sciences
- and many other business-to-business services

I understand that in many technically-oriented businesses the idea 'selling' is closely connected to thoughts of being pushy, insincere, and focused on 'closing the deal' without regard for the client.

But it doesn't have to be like that. Winning new business doesn't have to be distasteful, sleazy, or high-pressure. Indeed, professional selling is an essential skill for the success of expertise-based businesses.

## Professional selling pushes your team beyond their technical expertise

Let me reassure you that in the modern era of professional selling the objectives for your revenue engine team are:

- To be perceived as an **expert in their field**
- To be capable of offering **valuable insights** to the client (not just providing more and more information)
- To be a **responsive communicator** capable of relating to clients at all levels of seniority, within various functions of the clients business, and in all situations
- To be **sincerely curious** and willing to discover and explore new opportunities to expand your work with clients
- To be savvy about the **drivers of business success** within the industry sectors in which your clients operate
- To have a **high degree of self-management** and responsibility for their own goals and professional development

## How can you accelerate your revenue engine?

This guide outlines seven steps you can take to create a high performance sales team that builds on their technical expertise and existing client relationships.

It's important to understand that to be successful in winning new business your team members don't need to become a 'typical sales person' (with the negative connotations that go with that image). But they will need a clear vision, decisive management and direction on what to do, the opportunity to develop appropriate skills, and the responsibility for achieving their goals.

Now it's over to you to take the seven steps.

**Stuart Ayling**

*Author and Founder of Vectis*

PS. There is a handy management checklist and action planning guide at the end of this ebook. Use them to your advantage.

## Step 1: Create a culture of revenue growth

Many technically based businesses have a tendency to let the sales function manage itself.

In this environment the revenue engine team are not guided towards intentionally winning new business. The focus of effort is around the expertise or product being offered; trying to be the best in the field. The hope is that clients will like what you do so much that future sales are assured.

However, the winner in business rarely has the best product or service.

### **Winners, with strong sales growth, have the best revenue engines**

In addition to their expertise-based work, to accelerate your revenue engine you need your team to recognise and accept a culture of sales growth in your organisation.

‘Culture’ has been defined as:

The behaviours and beliefs characteristic of a particular social, ethnic, or age group.

For sales management purposes I define a ‘*culture of revenue growth*’ as:

The way you do business (behaviours, beliefs, language) that encourages regular critical and constructive discussion on how immediate and future revenue will be achieved.

The overall goal here is to create an expectation within the team that sales outcomes will be monitored, recognised and rewarded on a regular basis.

### **Ideas to foster a culture of revenue growth**

- Discuss specific tactics and plans for individual sales opportunities
- Have regular informal chats with your revenue engine team about specific clients and progress with potential opportunities
- Include a segment on sales (value, forecasts etc) in regular team meetings
- Mention new clients won or new pieces of work in internal communications such as newsletters or intranet pages

- Share the overall revenue plan for the business and discuss how individuals have a role to play
  - Create 'success stories' after new business has been won, to explain what was done to win that piece of work and communicate that story internally
- 

## Step 2: Include revenue responsibilities in Position Descriptions

It is a natural flow-on from instilling a *culture of revenue growth* to include revenue responsibilities in Position Descriptions (PD's) for roles that have the expectation of recognising, initiating and pursuing new business opportunities.

Indeed, it would be difficult to maintain a revenue growth culture without some form of personal responsibility and accountability for winning new business.

Typically the roles with revenue responsibilities include those with direct client contact such as professional, technical, advisory and sales positions.

### **First, understand the client relationship**

When creating revenue responsibilities it is important to understand the relationship your team members have with their clients.

For example if the client contact is at a relatively junior level (or has more of a hands-on operational focus) it may be unrealistic to expect your team member who deals with them to directly win a significant piece of work. That decision may be made by a more senior person within the client organisation.

However that does not mean your team member should not be held responsible for contributing in a relevant way towards winning new work. It comes down to identifying relevant revenue-related metrics for their role.

### **Input metrics**

In this example, rather than having primary responsibility for winning the new business your team member may instead have reporting metrics (Key Performance Indicators, or KPI's) such as:

- Number of leads passed to a senior colleague (for them to follow up)

- Number of internal referrals within the client organisation
- Number of contacts made with specific roles within the client organisation

These KPI's could be considered as Input Metrics because they measure the activity that relates to the creation (or input) of a potential sales opportunity.

### **Output metrics**

For senior members of your team who deal with decision makers in the client organisation you may identify more output-oriented metrics such as:

- Number (or type) of new projects won
- Number of proposals submitted
- Value of sales generated
- Client retention rate
- New relationships established
- Movement of sales through pre-defined stages of the sales process

When setting revenue-related KPI's it is helpful to decide if the particular metric is quantitative or qualitative. Both categories of metrics can be useful. But more importantly you must decide how to measure each KPI. What is the target?

For quantitative metrics it can be easy. Usually a number that represents a certain value, volume or percentage growth.

For qualitative metrics, such as 'develop a stronger relationship with the Maintenance Manager', it is necessary to clearly define in advance what a stronger relationship will look like.

### **Deconstruct the goal to create an action plan**

Once there are revenue-related KPI's for a role you can then deconstruct the desired result to determine the actions that must be taken by your team member to reach that goal. These actions can become part of the required tasks listed in the Position Description for that role.



## Step 3: Define a sales process and tools that work for your business

A sales process is a set of actions and decisions that are necessary to convert a 'lead' into a 'sale'.

The definition of 'lead' and 'sale' may vary from company to company, but the necessity of working through a sales process remains constant.

Traditionally the sales process was considered to be quite linear: Prospect; Engage; Qualify; Discovery; Proposal; Close.

### **But times have changed quite dramatically**

Research over recent years has shown many buyers are already over 60% of the way through their buying process before they even talk to a supplier.

This means that if a buyer contacts you today they are most likely ready to “talk turkey”, not spend time on general chit chat and tossing around new ideas like they may have in the old days when they were right at the start of their thinking.

In many ways it is more accurate to describe the sales process as 'facilitating the buying process'. As sellers we need to adapt to the stage the client is at in their purchase decision rather than forcing the sales conversation along an inappropriate linear sales model where we always want to start at the beginning.

When you are mapping out your sales process there are four main components to consider.

- 1. The client:**
  - a. Who is involved?
  - b. Does their involvement vary depending on the stage of the sales/buying process?
  - c. What are their goals and preferences?
- 2. The stages of the buying process:**
  - a. Develop this based upon a client profile, or persona
  - b. Consider the clients buying path, not your sales process
- 3. Tools and information needed at each stage:**
  - a. Documents such as technical specs, fact sheets, client testimonials, process charts etc (printed or digital)

- b. Guides for managing the conversion such as suggested responses to questions, frequently expected questions, and scripts
  - c. Knowledge of competitors and own services/products
- 4. The team members who will be involved**
- a. What skills and/or experience do they need?
  - b. Will they be available?
  - c. How will they communicate?

A process chart can then be developed that enables sales opportunities to be monitored as they progress from stage to stage through the process. This progress is often recorded in Customer Relationship Management (CRM) systems.

Importantly, a documented *sales process* gives you a framework to easily and directly discuss progress of individual sales opportunities with your team members.

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## Step 4: Implement sales reporting against objectives

The perfect accompaniment for the revenue responsibilities you included in Position Descriptions (from Step 2) is a process for reporting on sales against objectives. That is, reporting on the progress made on achieving the KPI's for each role.

Reporting criteria would typically compare what has been achieved versus what was planned to be achieved over the reporting timeframe.

To maximise output from your revenue engine it's important to be able to closely monitor the particular revenue-related activities being undertaken, and to track the effectiveness of those actions towards reaching your goals.

This is when having a *culture of revenue growth* (from Step 1) makes it easier to conduct concise analysis and discussion of performance against the plan.

Many businesses don't have a clear reporting process to manage revenue opportunities. They leave it to sporadic commentary and anecdotal feedback to determine their progress.

In contrast, high-performance sales teams are held accountable via a regular reporting process and clear reporting requirements. There should be no room to fudge the numbers.

Depending on your team and the degree to which you have adopted a *culture of revenue growth* your *sales reporting* structure may be anywhere from a casual verbal mention of overall sales during a team meeting, to structured written reports with sales forecast updates.

### Sales reporting options

Written	CRM updates	Monthly reports Sales forecasts Major Account Plans
Verbal	Corridor catch-ups 1-to-1 chats While visiting clients	Verbal reports at weekly meetings Presentations at sales conferences
	Informal	Formal

## Step 5: Be an effective ‘sales’ manager

If you are responsible for the revenue engine in your business, you are a Sales Manager. Even if your official title doesn’t include the word ‘sales’, when you manage your revenue engine team, you are managing sales.

It is often the case that Sales Management is viewed from a very operational perspective; focused on reporting tasks and getting the sales team to ‘hit the number’ by making more calls, doing more proposals and conducting more presentations.

However for expertise-based businesses the role is certainly more diverse and professionally challenging. A major challenge is to encourage and coordinate the efforts of your team members (who are possibly technical ‘experts’) to undertake

the potentially uncomfortable task of initiating sales conversations and following up on new business opportunities.

**In an expertise-based business three skill sets are required to be an effective Sales Manager.**

1. Being a Leader
2. Being a Manager
3. Being a Coach

Sales Leader	Sales Manager	Sales Coach
Inspires people to believe in a vision and to <b>want</b> to achieve	Organises people and tasks, and removes barriers, so people <b>can</b> achieve	Encourages reflection and personal responsibility for <b>taking action</b>
Instils a sense of a higher purpose for technical and professional staff so they see the value in selling	Provides the tools and resources to enable the team to undertake sales activities	Assists the team member to see how he can help himself to achieve his goals

## Step 6: Provide training and coaching for your team

In expertise-based businesses the ‘sales team’ often do not have a strong (if any) background in professional selling methodologies. They come from their own professional or technical domain and may even be considered experts in their field. But when it comes to business development activities they probably feel like a novice. And that can be uncomfortable for them.

It’s not surprising that most technical specialists and professionals don’t like the idea of selling. It conjures up images of the stereotypical fast-talking, shiny-suited salesman – not something they aspire to be!

As the sales leader it is your responsibility to review the talents of your team and provide the necessary depth of training, coaching and opportunity to experience new situations to:

- Give them the skills, strategies and tools they will need
- Encourage them to try something new and unfamiliar, practice using the strategies and tools, and in doing so expand their professional comfort zone
- Provide individual feedback to help them improve

### **Your goal is to build the sales capability of each individual, and of your entire team**

Within the expertise-based business training opportunities can be identified across these areas:

- **Professional selling skills:** intentional communication skills and specific strategies to initiate and manage productive sales conversations
- **Presentation skills:** to ensure your message is being communicated with power whether one-to-one in the field, or to senior management teams in head office environments
- **Time management:** to enable individuals to recognise their priorities and make smart decisions about their choices and how they manage themselves (because time management doesn't really exist)
- **Self-development:** helping individuals undertake appropriate educational opportunities to improve their professional and personal presence
- **Product/service knowledge:** to provide confidence and knowledge that can be utilised during sales conversations
- **Business knowledge:** to understand the driving forces for business success in their industry sector, and that of clients

Depending upon the specific requirements for your team and the resources available within your organisation, you can access training through:

- External providers who conduct customised in-house workshops (including Vectis)
- Internal training programs you develop that are conducted by Subject Matter Experts or senior practitioners, or
- Utilise the vast range of courses available to individuals through learning institutions and online providers in the public domain

## Step 7: Stay in touch with the market

Sales leaders usually hold senior positions within their organisation. As a result, much of their time can be consumed by planning for the future ('big picture' thinking), crisis management and responding to short term issues, and a range of internally-focussed demands that crop up on a daily basis.

### **Sales leaders are short on time – but that is no excuse**

Getting out of your office and keeping abreast of what the revenue engine team are facing in the market can be difficult (some may say impossible). But the result of always giving your attention to what is happening inside the business means that your external view may become very myopic.

The impact of this lack of awareness is that sales leaders can become out of touch with the reality their team is facing. In turn this can reduce their credibility, their relevance in the eyes of their team, and ultimately their authority.

### **Your revenue engine operates in the real world – be in tune with it**

To avoid being caught on the back foot and losing touch with the market you must find a way to prioritise time for sales leadership, sales management, and sales coaching activities, such as:

- Getting out in the field with your team on client visits (sales calls)
- Reading industry publications and online sources
- Building networks with complementary suppliers
- Attending conferences and looking for trends and industry influences
- Reading new books on sales and management methodologies

The following checklist provides a list of activities relevant for each role of Sales Leader, Sales Manager and Sales Coach, including some appropriate to stay in touch with the market. Use it to identify your opportunities for improvement.

## Checklist of Improvement Activities

Activity	Sales Leader	Sales Manager	Sales Coach
Getting out in the field with your team & giving feedback		✓	✓
Self-education; reading industry publications	✓	✓	✓
Setting a vision	✓		
Fostering a culture of revenue growth	✓	✓	
Observing and analysing competitor activity	✓	✓	
Understanding individuals on the team		✓	✓
Reviewing sales goals and reports		✓	
Analysis of company results and trends	✓	✓	
Review of CRM data		✓	
Conducting performance reviews		✓	
Reviewing/updating the sales process		✓	
Being available for contact from your team		✓	✓
Finding resources for your teams development needs		✓	✓
Creating coaching opportunities			✓

## Managing Your Revenue Engine - Improvement Action Plan

7 Steps to Create a High Performance Sales Team	Current Rating* 1 ... 10 1 (not doing) 5 (sometimes) 10 (frequently)	Improvement Actions What will you do?	Priority
1) Create a culture of revenue growth			
2) Include revenue responsibilities in PD's			
3) Define a sales process and tools			
4) Implement sales reporting against objectives			
5) Be an effective sales manager			
6) Provide training and coaching opportunities			
7) Stay in touch with the market			

\* Any Steps with a rating under 5 need serious attention. Use this rating as a baseline and review again in the future to monitor your progress.



## About the Author



**Stuart Ayling specialises in growth and performance improvement for expertise-based businesses.**

**Stuart has worked in sales and marketing for over 20 years and has developed practical proprietary methodologies to ensure clients achieve business improvements.**

**He holds a Bachelors Degree in Marketing and a Graduate Certificate in International Business.**

Connect with Stuart at LinkedIn <http://au.linkedin.com/in/sayling>

With a background in corporate sales and marketing management roles, and nearly two decades running his own consultancy, Stuart has worked with leading businesses across Australia and internationally to achieve business growth.

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“Stuart's training methods have enabled our sales team to challenge their current practices and to see new innovative ways of improving their selling skills in a fun and interactive environment. Our sales results have increased since incorporating Stuart's sessions into our sales conference and this has been during a downturn in the market.”

Justin Zakaras, National Sales and Marketing Manager  
Danley Construction Products

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“Since we did the training with you, at this time last year, sales reporting is more informative and sales figures have increased too, up by 20% on last year to date!! They also continue to pick up new customers, as well as continuing their ongoing relationships with current customers.”

Sharyn Moran, General Manager  
Betta Blinds & Awnings

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“What impressed me straight away with Stuart was his ability to get the right information out of us as managers as to what we really wanted to achieve as a business. I expect to see very positive results from this investment in our people and business. In fact we have already seen a new client on board as a result of our revised learning's from the two-day workshop.”

Mark Mahoney, Managing Director  
iMS Group

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**Contact Vectis to explore your training and development and business growth options.**

[www.vectisadvisors.com.au](http://www.vectisadvisors.com.au) | [info@vectisadvisors.com.au](mailto:info@vectisadvisors.com.au)  
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