

# Mastering Situational Sales Leadership

**Dialpad Sales Leader Development** 

Tuesday, February 13, 2024







# My Spin Studio

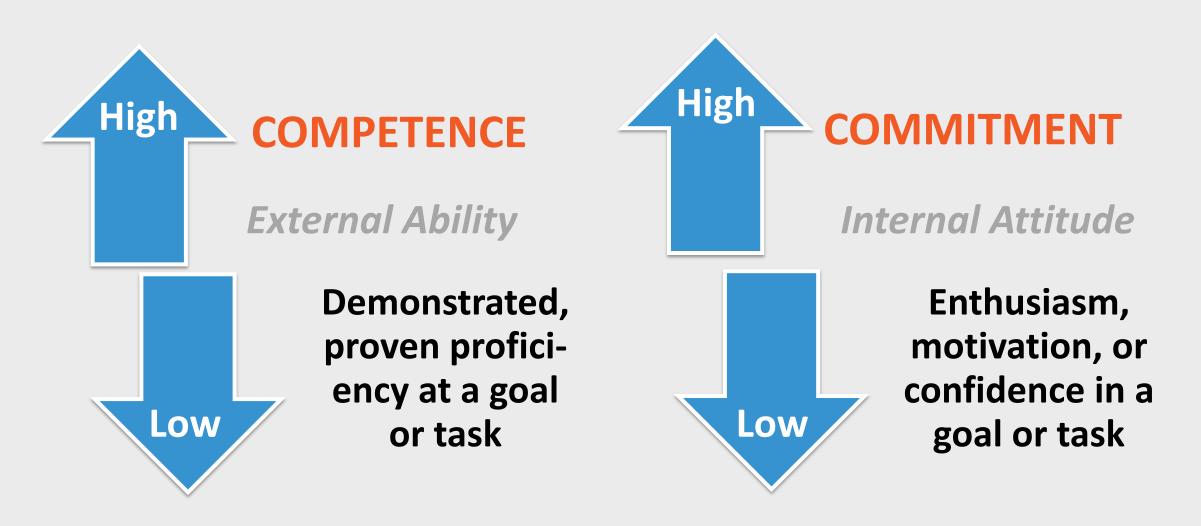
- Did all the classes by herself and quickly burned out
- Multiplied herself by training other spin class leaders
- Business expands to 100's of members and opens other studios

# Sales Leadership as a Spin Studio

- New sales managers, and some seasoned ones, make this big mistake: they try to be involved in as many deals as possible. This leads to burn out!
- Successful sales managers multiply themselves in others, investing in rep development, because rep development drives deals and scales sales.
- Rep development is a process that progresses from watching others sell to selling with someone, from being watched and, finally, launched. Don't rush it!
- Your career trajectory is entirely dependent on being able to build robust sales capacity on your team, not closing deals yourself.



# **STEP ONE: Assess Development**

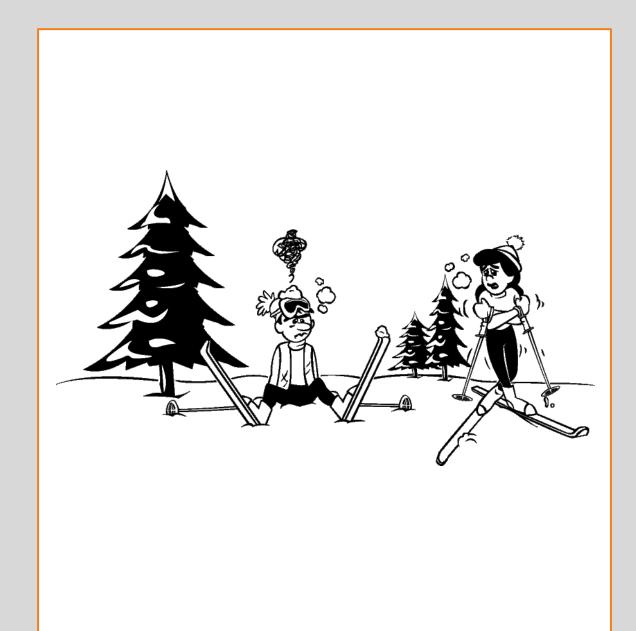




Low Competence and High Commitment

Inexperienced
Eager
Enthusiastic
Optimistic

Don't know what they don't know



Low to Some Competence and Low Commitment

Frustrated
Discouraged
Overwhelmed
Confused

Yet with flashes of competence

Moderate to High
Competence and
Variable
Commitment

Capable but ...
Cautious
Productive but ...
Tentative

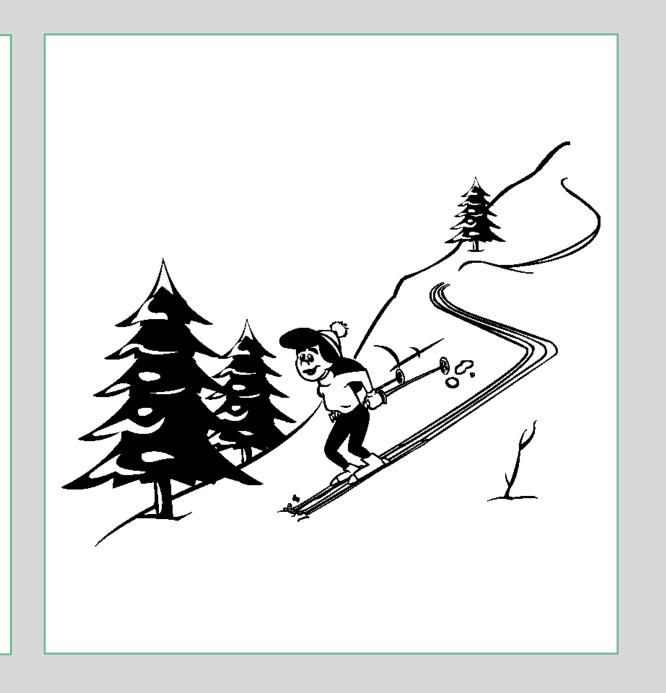
No confidence in his or her competence



High Competence and High Commitment

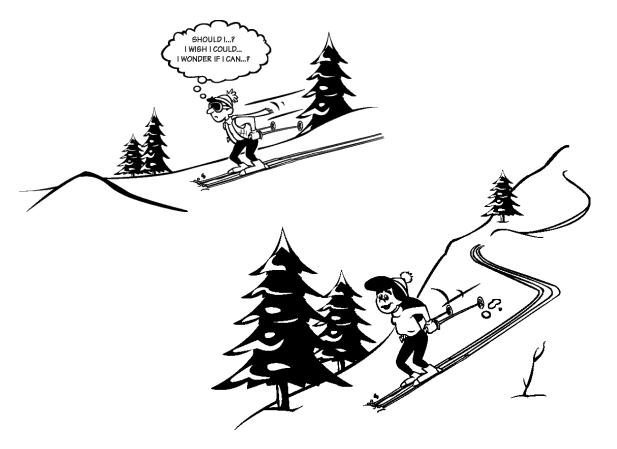
Consistent
Confident
Inspired
Independent

If not challenged, may get bored



# Situational Sales Leadership DEVELOPMENT

# COMPETENCE



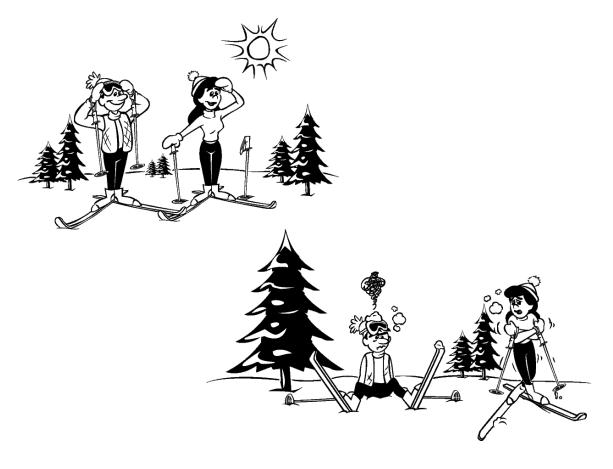
#### Task specific:

- Demonstrated ability
- Proven proficiency
- Transferrable skills



# Situational Sales Leadership DEVELOPMENT

# COMMITMENT



#### Task specific:

- Enthusiasm
- Motivation
- Confidence



D1	<b>D2</b>	D3	<b>D4</b>
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
Inexperienced Eager Enthusiastic Optimistic			
Don't know what they don't know			

D1	D2	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
Inexperienced Eager Enthusiastic Optimistic	Frustrated Discouraged Overwhelmed Confused		
Don't know what they don't know	Yet with flashes of competence		

D1	<b>D2</b>	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
Inexperienced Eager Enthusiastic Optimistic  Don't know what they don't know	Frustrated Discouraged Overwhelmed Confused  Yet with flashes of competence	Capable but Cautious Productive but Tentative  No confidence in his or her competence	

D1	<b>D2</b>	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
Inexperienced Eager Enthusiastic Optimistic	Frustrated Discouraged Overwhelmed Confused	Capable but Cautious Productive but Tentative	Consistent Confident Inspired Independent
Don't know what they don't know	Yet with flashes of competence	No confidence in his or her competence	If not challenged, may get bored

D1	D2	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
Inexperienced Eager Enthusiastic Optimistic	Frustrated Discouraged Overwhelmed Confused	Capable but Cautious Productive but Tentative	Consistent Confident Inspired Independent
Don't know what they don't know	Yet with flashes of competence	No confidence in his or her competence	If not challenged, may get bored

# Meet Hilary ...

Hilary is a bright, talented sales rep for a fast-growing technology company. She works hard and hits goal every year. Hilary has great client management and interpersonal skills and is known in the company as a top performer. People like Hilary, and she likes the energy a new challenge gives her. Hilary is now being asked to take on some new responsibilities to build the business and to prepare her for a sales management position for which she's been recommended.



#### **Scenario One**

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

What is Hilary's **development level**?

Hilary has been asked to craft a new business development strategy for a very important client. She will need to put in a lot of extra time just to get it done, and she doesn't see enough of her daughter as it is. Her sales manager has told her to do the initial work on this strategy by herself, but the complexity of this task is overwhelming. She knows she does not have a good enough grasp of the client's business or current company's options in this situation. Hilary wishes she could get more information on how to complete this project.

#### **Scenario Two**

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

What is Hilary's development level?

Hilary has been asked to put together a multinational team to increase her company's business with selected global accounts. This is a fabulous opportunity for her, and she's excited about it. However, she doesn't have contacts in several of the markets, hasn't ever worked internationally, and isn't sure where to start.

#### **Scenario Three**

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

What is Hilary's development level?

Hilary has been asked to make a presentation to a key group of decision-makers in an account she's been working with for a long time. There's a lot of new business at stake, but Hilary knows exactly what she needs to say and feels confident about her preparation. Hilary is always at her best when she's asked to make a compelling case for her company's products and services.

#### **Scenario Four**

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

What is Hilary's development level?

The VP of Sales in Hilary's company has recently instituted a new weekly sales report. Each sales rep has been asked to report on five key performance indicators every Friday. As a top performer, Hilary doesn't see any value in taking time to compile the information, although all she has to do is pull the data from the notes she's already entered into the company's sales force software. She hasn't submitted the form in two weeks and word is starting to get around that Hilary isn't doing the weekly report. The VP of Sales is concerned others will follow her lead.

#### **Scenario Five**

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

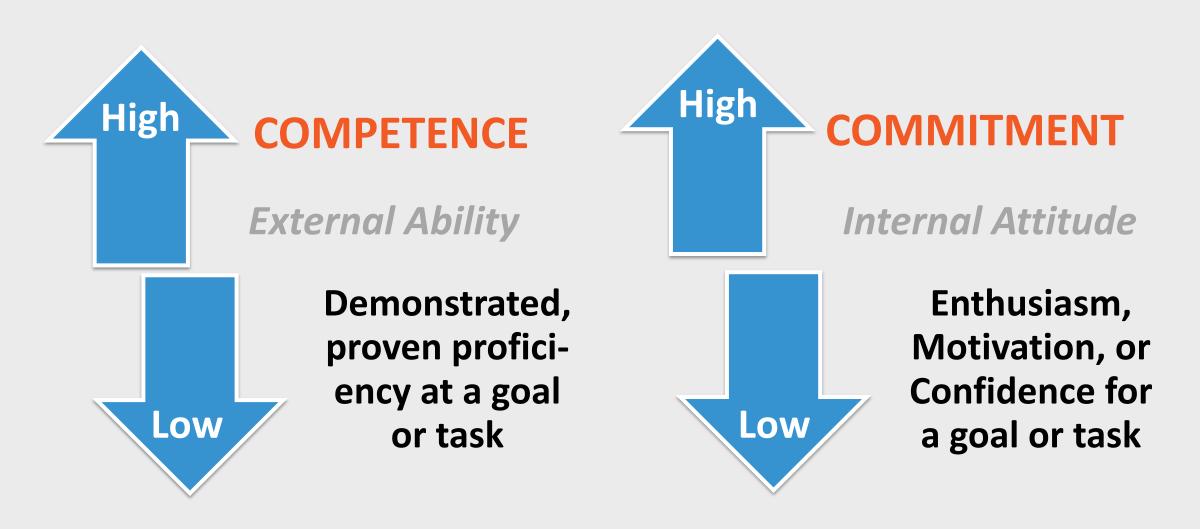
What is Hilary's development level?

Hilary has been asked to cut her selling expenses by 10% in order to increase profitability. She's concerned that the cuts, like last time, will have an impact on the ability to drive new business. Hilary believes she can bring in more revenue if she goes ahead with the planned expenditures. She's convinced that this is the best approach to greater profitability: increasing sales with key accounts and building new business. She has her immediate manager's support, but her manager has asked her to make the case to his manager. Hilary's nervous. What if she isn't persuasive?

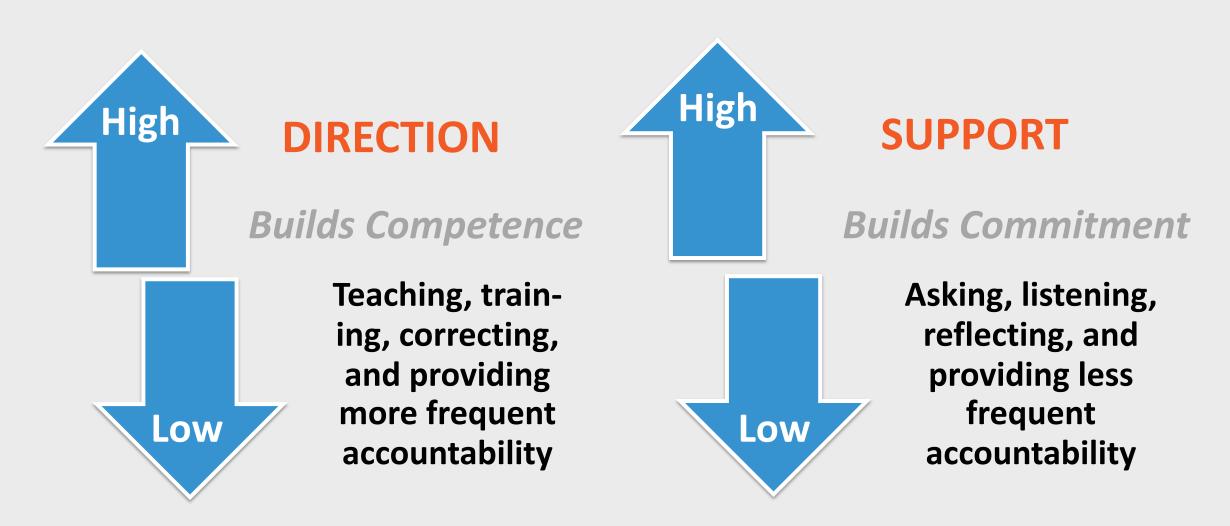
What's Wrong with This Picture?



# **STEP ONE: Assess Development**



# **STEP TWO: Match Style**



Adapted from Management of Organizational Behavior, Hersey, P. and Blanchard, K.H. (1969)

D1	D2	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
<b>S1</b>	<b>S2</b>	<b>S3</b>	<b>S4</b>
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support

<b>S1</b>	<b>S2</b>	<b>S3</b>	<b>S4</b>
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
Affirm enthusiasm			
Define success clearly			
Give concrete examples			
Teach and show HOW			
Check for understanding			
Check work frequently			

<b>S1</b>	<b>S2</b>	<b>S3</b>	<b>S4</b>
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
Affirm enthusiasm  Define success clearly  Give concrete examples  Teach and show HOW  Check for understanding  Check work frequently	Understand frustrations  Analyze failures  Provide perspective  Explain WHY  Fill in learning gaps  Check work consistently		

<b>S1</b>	<b>S2</b>	<b>S3</b>	<b>S4</b>
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
Affirm enthusiasm  Define success clearly  Give concrete examples  Teach and show HOW  Check for understanding  Check work frequently	Understand frustrations  Analyze failures  Provide perspective  Explain WHY  Fill in learning gaps  Check work consistently	Ask questions and listen Analyze successes Provide reassurance Help hear own voice Clear path of problems  Check work regularly	

<b>S1</b>	<b>S2</b>	<b>S3</b>	<b>S4</b>
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
Affirm enthusiasm	Understand frustrations	Ask questions and listen	Treat as a partner/peer
Define success clearly	Analyze failures	Analyze successes	Celebrate successes
Give concrete examples	Provide perspective	Provide reassurance	Provide autonomy
Teach and show HOW	Explain WHY	Help hear own voice	Recognize publicly
Check for understanding	Fill in learning gaps	Clear path of problems	Push for a little bit more
Check work frequently	Check work consistently	Check work regularly	Check work occasionally

<b>S1</b>	<b>S2</b>	<b>S3</b>	<b>S4</b>
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
Affirm enthusiasm	Understand frustrations	Ask questions and listen	Treat as a partner/peer
Define success clearly	Analyze failures	Analyze successes	Celebrate successes
Give concrete examples	Provide perspective	Provide reassurance	Provide autonomy
Teach and show HOW	Explain WHY	Help hear own voice	Recognize publicly
Check for understanding	Fill in learning gaps	Clear path of problems	Push for a little bit more
Check work frequently	Check work consistently	Check work regularly	Check work occasionally

# **Situational Sales Leadership STYLES**

Clear expectations
Step-by-step instructions
Concrete examples
Mid-course correction
More frequent accountability





## Situational Sales Leadership STYLES

# **SUPPORT**

**Asking questions** 

**Active listening** 

**Accurate reflection** 

**Positive encouragement** 

Less frequent accountability



# Situational Sales Leadership STYLES

# **DIRECTION**

Clear expectations
Step-by-step instructions
Concrete examples
Mid-course correction
More frequent accountability

### **SUPPORT**

**Asking questions** 

**Active listening** 

**Accurate reflection** 

Positive encouragement

Less frequent accountability



You have asked one of your experienced sales representatives to prepare a one-hour presentation for next month's team meeting. The presentation is to compare a newly released product with a competitor's product. He is excited about presenting this data at the meeting but is having trouble understanding information about the competitor's product. The presentation outline is five days overdue.

What is the **specific goal**?

What is this person's competence in completing the goal?

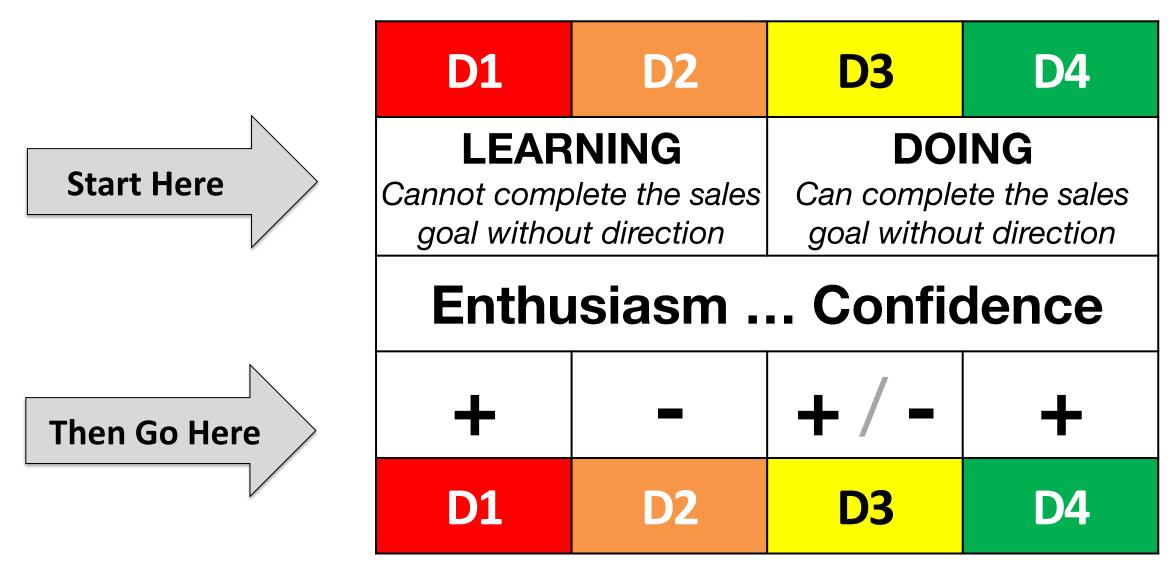
What is person's **commitment** in completing the goal?

What is his development level?

You have asked one of your experienced sales representatives to prepare a one-hour presentation for next month's team meeting. The presentation is to compare a newly released product with a competitor's product. He is excited about presenting this data at the meeting but is having trouble understanding information about the competitor's product. The presentation outline is five days overdue. You would ...

- A. Express concern about the lateness of the outline but give him more time to complete the task. Set another deadline to receive the report.
- B. Ask him why the outline is late. Listen to his concerns and facilitate his problem-solving efforts to improve the presentation outline. Periodically check to see that he carries out his own ideas.
- C. Tell him that you want the presentation outline in two days. Interpret the data on the competitor's product. Show him what the outline should look like and closely monitor his work.
- D. Discuss the data with him. Solicit his input but make sure he follows your general ideas. Follow up to see if the work is being done on time.

## Situational Leadership Decision Tree



One of your sales representatives is very reluctant to call on larger accounts. She thinks larger accounts take longer to sell, are harder to close, and require connecting with senior level decision makers. All things she doesn't think she's good at. While this may be true, both you and your VP of Sales know that larger accounts are important to the future of the company and to her success as a sales professional.

What is the **specific goal**?

What is this person's competence in completing the goal?

What is this person's **commitment** in completing the goal?

What is her development level?

One of your sales representatives is very reluctant to call on larger accounts. She thinks larger accounts take longer to sell, are harder to close, and require connecting with senior level decision makers. All things she doesn't think she's good at. While this may be true, both you and your VP of Sales know that larger accounts are important to the future of the company and to her success as a sales professional.

- A. Discuss how she should start calling on larger accounts. Begin to work on the prospecting skills she needs by demonstrating how to gain access to senior decision makers. Explain why this activity is so important to the company's future and include her suggestions whenever possible. Regularly check on her progress.
- B. Specify exactly how she should call on larger accounts. Begin to work on the prospecting skills she needs by demonstrating how to gain access to senior decision makers. Closely monitor her progress.
- C. Ask her to start calling on larger accounts but listen to her objections and concerns. Explain the importance of larger accounts to the company's future. Explore what encouragement from you she needs to get started. Agree on a plan to monitor progress.
- D. Ask her to call on larger accounts. Let her know that she needs to start closing deals with them and be available to help when needed. Ask to be kept informed on progress.

# Follow-Up Frequency by Leadership Style

<b>S1</b>	<b>S2</b>	S2 S3	
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
Check work frequently	Check work consistently	Check work regularly	Check work occasionally

# Follow-Up Frequency by Leadership Style

<b>S1</b>	<b>S2</b>	<b>S3</b>	<b>S4</b>
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
Check work frequently  Follow-up every day or	Check work consistently  Follow-up every other	Check work regularly  Follow-up every week or	Check work occasionally  Follow-up every other  week or every month
every other day.	day or every week.	every other week.	week or every month.

Each leadership style **holds team members accountable** for the completion of their goals. Differences by style lie in the **development of a team member** and the frequency in which follow-up takes place.

One of your salespeople and one of your pre-sales engineers have to work together often. In the past, they have not demonstrated the interpersonal skills needed to do this in a positive and productive manner. They spend more time catching each other doing things wrong rather working out their differences and partnering together. Last week a deal fell apart because they disagreed sharply with each other on a demo in front of a prospect.

What is the **specific goal**?

What is the competence in completing the goal?

What is the commitment in completing the goal?

What is their development level?

One of your salespeople and one of your pre-sales engineers have to work together often. In the past, they have not demonstrated the interpersonal skills needed to do this in a positive and productive manner. They spend more time catching each other doing things wrong rather working out their differences and partnering together. Last week a deal fell apart because they disagreed sharply with each other on a demo in front of a prospect. You should...

- A. Let the two people know that you are aware of the situation. Ask them to take care of it themselves and get back to you if they have any more issues to resolve.
- B. Meet with the two people and outline the problem as you see it. List the steps of action they need to take to resolve this issue immediately. Follow up every few days to make sure that your steps of action are implemented.
- C. Hold a meeting with the two and discuss the situation, but do not impose your ideas on them. Help them explore their own solutions to the problem and follow up in a month or so to see how things are going.
- D. Meet with the two together and listen to each of their points of view on the situation. Tell them what you think they need to do to work together better but ask for their ideas and incorporate them into a plan for a more harmonious partnership. Make it clear that the problem must be solved immediately and follow-up with them weekly.

# **Talking versus Listening by Leadership Style**

STYLE 1	STYLE 2	STYLE 3	STYLE 4
10%			
	50%	<b>75%</b>	90%
90%	50%		
		25%	10%

D1	D2	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
<b>S1</b>	<b>S2</b>	<b>S3</b>	<b>S4</b>
High Direction and Low Support I talk, I decide.	High Direction and High Support We talk, I decide.	Low Direction and High Support  We talk, you decide.	Low Direction and Low Support You talk, you decide.



# Target Half Marathon Time:

2 hours and 15 minutes

# Weekly Running Workouts:

Long runs
Tempo runs
Interval workouts
Recovery runs
Core exercises

# **Performance Goals Process Goals**



#### **Process Goals**

Total sales by month, quarter, and year

Sales activities by day, week, and month



#### **Process Goals**

Total sales by month, quarter, and year

Sales activities by day, week, and month

Set as a sales quota each year

Repeated over and over again



#### **Process Goals**

Total sales by month, quarter, and year

Sales activities by day, week, and month

Set as a sales quota each year

Repeated over and over again

What your salespeople need to achieve

**How** your salespeople will be able to achieve it



#### **Process Goals**

Total sales by month, quarter, and year

Sales activities by day, week, and month

Set as a sales quota each year

Repeated over and over again

What your salespeople need to achieve

**How** your salespeople will be able to achieve it

Target marathon time

Weekly running workouts



Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
	☐ Low to Some☐ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some☐ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
	☐ Low to Some ☐ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		

How to
Set a Sales
Process
Goal



State *specifically* **WHAT** needs to be achieved.



Summarize *specifically* **HOW** it is to be achieved.



Define *specifically* **WHEN** it is to be achieved with a deadline, a repetition cadence, or both.

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
15 customer meetings per week	□Low to Some □ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
Demo Hygiene	□Low to Some □ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
Engage every customer with a POV	□Low to Some □ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
2 Customer product demos per week	□Low to Some □ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
Have appropriate SPICED Fields uncovered and noted for each of the completed or current Opportunity stages.	□Low to Some □ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
Source within each Quarter, 4X your annual quota in Qualified Pipeline (S1 & Beyond)	□Low to Some □ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
Achieve 100% or more across your Vital 5 each week	□Low to Some □ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
	☐ Low to Some ☐ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal		D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
	☐ Low to Some ☐ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some☐ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
	☐ Low to Some☐ Mostly High	☐ Low to Variable☐ Mostly High		
	☐ Low to Some ☐Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some ☐ Mostly High	☐ Low to Variable ☐ Mostly High		
	☐ Low to Some☐ Mostly High	☐ Low to Variable☐ Mostly High		

Sales Process Goal	Competence	Commitment	Develop- ment Level	Leadership Style Strategies
A specific, repeated activity that moves a salesperson closer to achieving a sales performance goal	Demonstrated, proven ability to complete a process goal	Enthusiasm, motivation, or confidence to complete a process goal	D1, D2, D3, D4	The specific mix of direction and support you will use to coach this salesperson on each process goal
Reach out to new account list by sending an outreach email sequence to 75% of account base by end of Q1.	✓ Low to Some  ☐ Mostly High	☐ Low to Variable ✓ Mostly High	D1	Be very prescriptive. Tell exactly what to say, how to follow-up, how to structure the first meeting. Check-in briefly, daily.
Create 12-16 cross-sell opportunities within existing account list by end of Q2.	✓ Low to Some □ Mostly High	✓ Low to Variable ☐ Mostly High	D2	Lead with empathy, listen to concerns, but still be prescriptive. Uncover cross-sell customers. Shadow another rep's conversations. Debrief. Shadow rep's conversations with debrief.
Take better control of deals by perfecting timeline through better use of upfront contracting and a 5-10% higher forecast per month.	☐ Low to Some ✓ Mostly High	✓ Low to Variable ☐ Mostly High	D3	Analyze BMW and grow B by asking lots of questions. Resist the urge to give advice. Get him to hear his own voice and set his own direction.

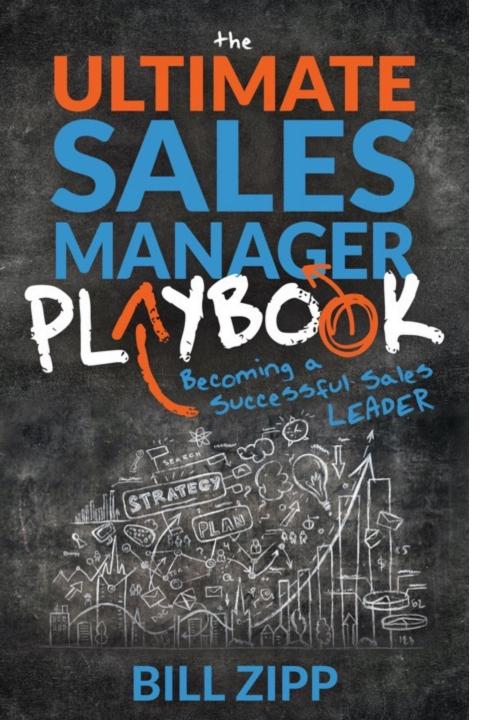
# Situational Sales Leadership Quiz



Team AUSTIN
Captain Carl



Team HUB-REMOTE
Captain Chris



### **Situational Sales Leadership**

Tuesday, February 13, 2024

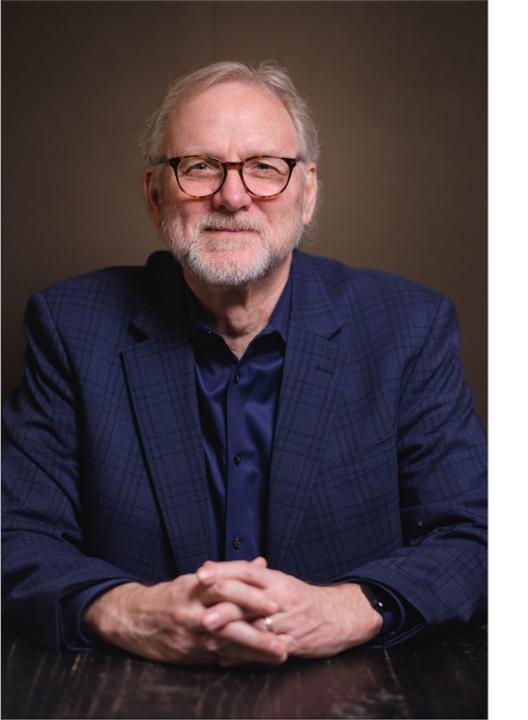
Plus Follow-Up Webinar Sessions

#### **Do These Three Things:**

- 1. Complete the Situational Sales Leadership Quiz online by EOB.
- 2. Listen to the SSL podcasts
- 3. Complete another Sales Coaching Planner

**Your Dedicated Web Resource Page:** 

https://billzipp.com/dialpadsalesleadership/











**businessolver** 

SAP Concur C.







## Four Keys to Good Goal Setting in Sales

- 1. Make annual sales goals clear and progress against goal current by week, month, and quarter.
- 2. **Define** the steps in your sales process, from first touch to won deal.
- **3. Identify** 2-3 steps in your sales process each rep needs to master and **focus** on those steps like a laser.
- 4. Measure progress on each step and identify new steps when mastery is attained.

