

Mastering Situational Sales Leadership

Dialpad Sales Leader Development

Monday, March 11 and Tuesday, March 12, 2024



Situational Sales Leadership Quiz

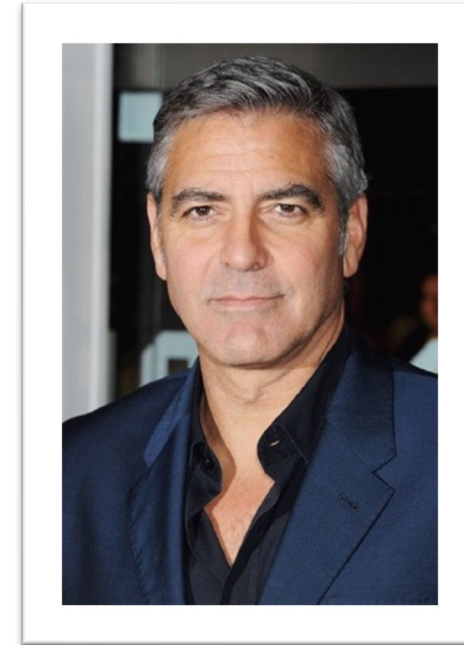
Team REMOTE



Captain Chris Herrera

91.67%

Team AUSTIN



Captain Carl Kah

92.83%

Most Missed Question One

Mason doesn't see any value in completing call reports in Sales Force. Although it's easy for him to do, he doesn't like doing it and feels that Big Brother is always watching him. On this task **Mason** is:

- A. Development Level 1
- B. Development Level 2
- C. Development Level 3
- D. Development Level 4

Most Missed Question Two



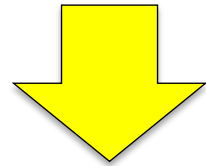

In a one-on-one with a new team member, **Taylor** is providing this salesperson with concrete examples of effective outbound phone prospecting. She's also set up times where he can shadow the calls of other team members who excel at this task. **Taylor** is using:

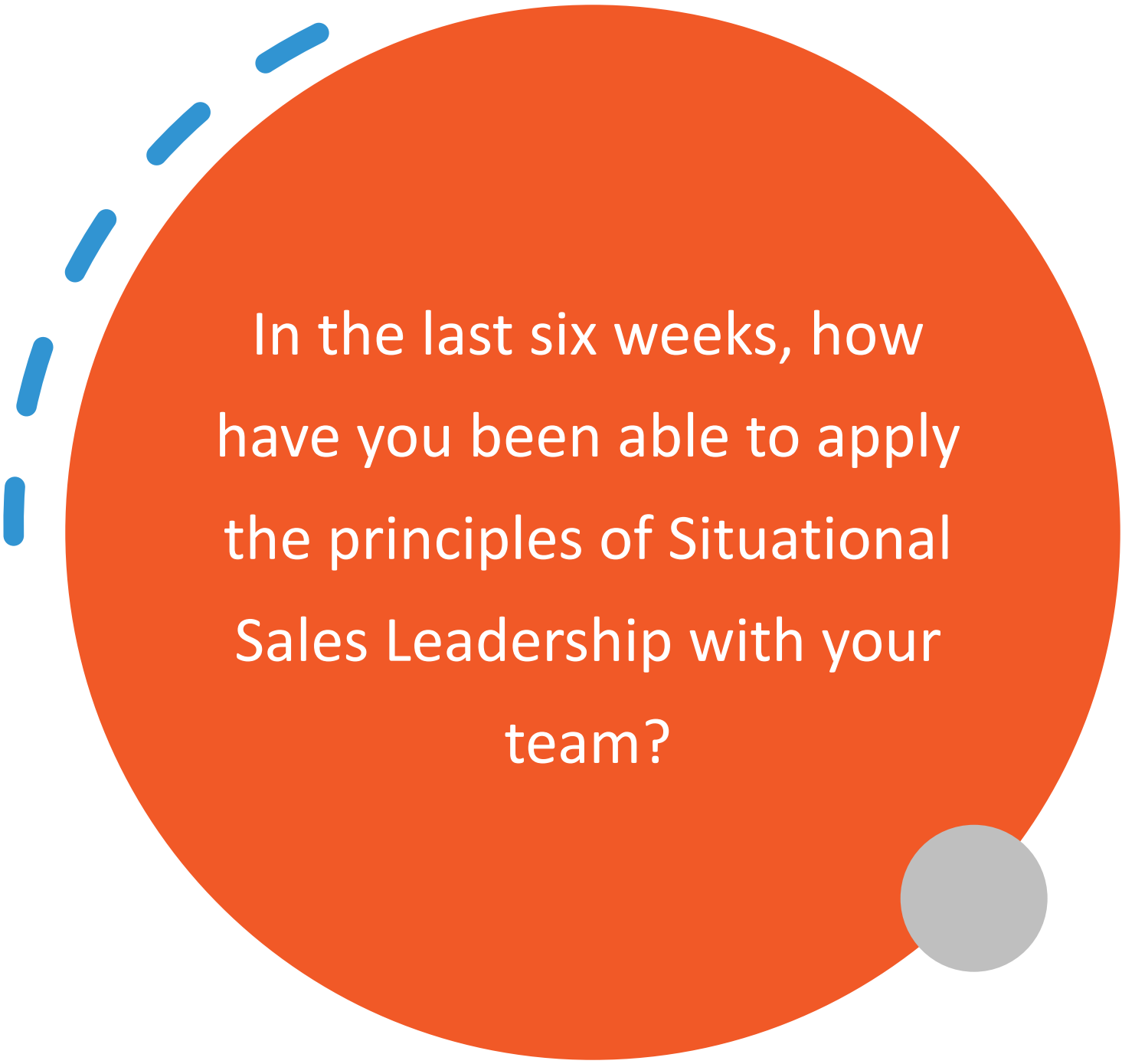
- A. Leadership Style 1
- B. Leadership Style 2
- C. Leadership Style 3
- D. Leadership Style 4

Most Missed Question Three

Kyle is frustrated because another big deal he forecasted to close pushed to the next quarter. His manager let him vent his frustration but then helped him develop close plans for key accounts in his pipeline. **Kyle's** manager is using:

- A. Leadership Style 1
- B. Leadership Style 2
- C. Leadership Style 3
- D. Leadership Style 4

| 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 |
|  |  |  |  |
| S1 | S2 | S3 | S4 |
| High Direction and Low Support | High Direction and High Support | Low Direction and High Support | Low Direction and Low Support |



In the last six weeks, how
have you been able to apply
the principles of Situational
Sales Leadership with your
team?

For the second time in a month, you are having sales documentation problems with one of your sales representatives. Her call reports have been late and incomplete. In the past year she has demonstrated timeliness and accuracy with these reports, and this is the first time you have spoken to her about the problem.

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 her **development level**?

For the second time in a month, you are having sales documentation problems with one of your sales representatives. Her call reports have been late and incomplete. In the past year she has demonstrated timeliness and accuracy with these reports, and this is the first time you have spoken to her about the problem. You would ...

- A. Ask her to complete her sales documentation on time and accurately, without pushing her. Continue to track the completeness and timeliness of her reports.
- B. Tell her to improve the completeness and timeliness of her sales documentation. Go over the areas that are incomplete. Make sure she knows what is expected and how to fill out each section of the report. Continue to track the completeness and timeliness of her reports.
- C. Ask her why her sales documentation is incomplete and late. Listen to her concerns and try to help her understand the importance of turning in accurate and timely reports. Continue to track the completeness and timeliness of her reports.
- D. Discuss sales documentation standards with her. Listen to her concerns but make sure she knows what is expected. Go over each section of the report and answer any questions. Continue to track the completeness and timeliness of her reports.

Situational Leadership Decision Tree



| | | | |
|---|----|---|----|
| D1 | D2 | D3 | D4 |
| LEARNING <i>Cannot complete the sales goal without direction</i> | | DOING <i>Can complete the sales goal without direction</i> | |
| Enthusiasm ... Confidence | | | |
| + | - | + / - | + |
| D1 | D2 | D3 | D4 |

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?

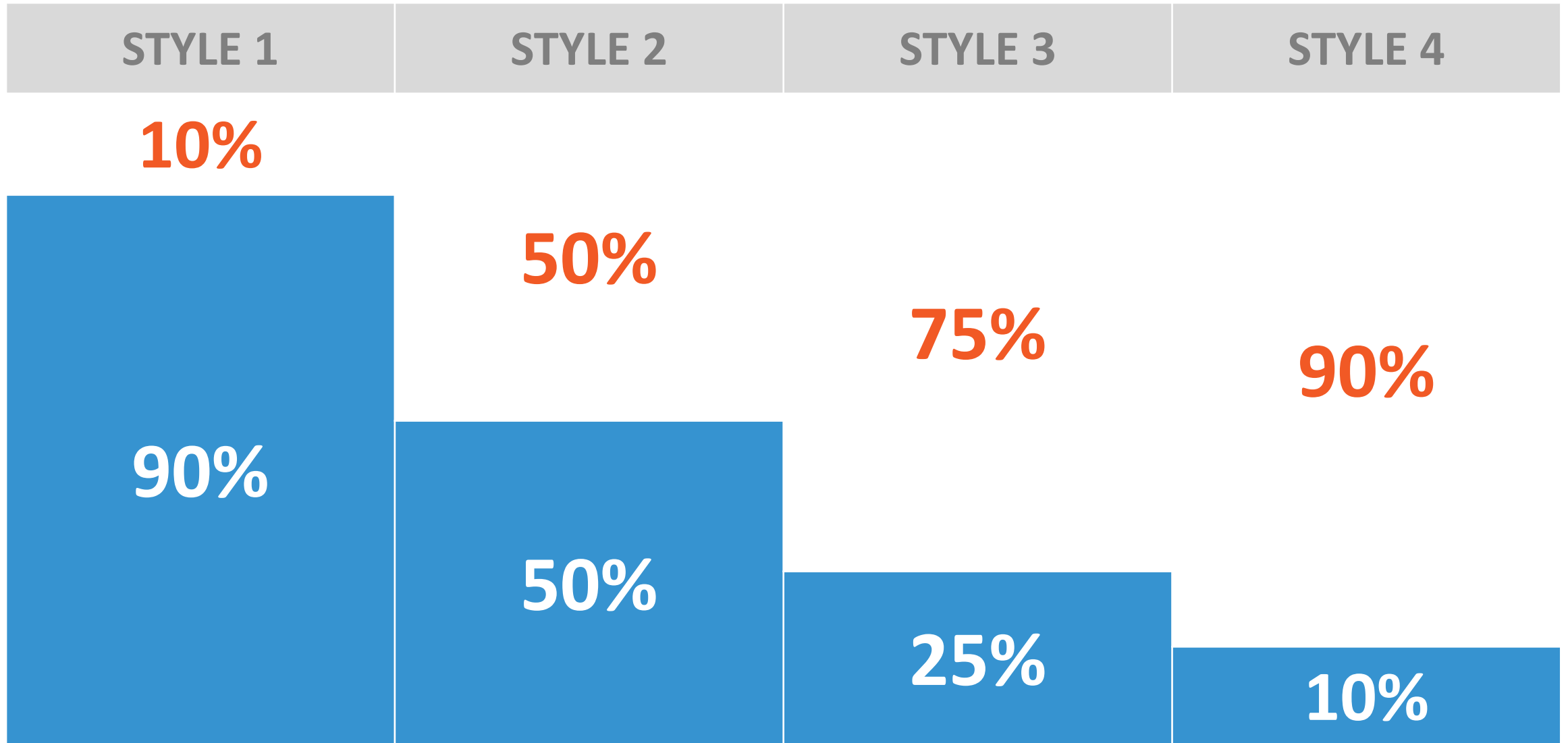
What is the **commitment** in completing the goal?

What is their **development level**?

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- 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




What do you do if
a salesperson
DISAGREES with
you about their
development?

- Clarify *exactly* what the sales activity you're asking of them really means.
- Measure *accurately* what excellence at this sales activity really looks like.
- If disagreement still exists, accept the salesperson's self assessment.
- Increase follow-through frequency to be more like a Style 1.



What do you do if
a salesperson goes
BACKWARDS in
development?

| 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 |
| |  | | |
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What do you do if
a salesperson goes
BACKWARDS in
development?

- Start by asking questions in a Style 3 mode. Don't overcorrect!
- Find out what's changed: The sales goal or the motivational environment?
- Adjust your style accordingly, 3 to 4 or 3 to 2 (if necessary).
- Increase follow-through frequency to be more like a Style 1.

Situational Sales Coaching Planner

| Sales Process Goal | Competence | Commitment | Development 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 | <i>D1, D2, D3, D4</i> | The specific mix of direction and support you will use to coach this salesperson on each process goal |
| | <input type="checkbox"/> Low to Some <input type="checkbox"/> Mostly High | <input type="checkbox"/> Low to Variable <input type="checkbox"/> Mostly High | | |
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How to Set Sales Process Goals

X

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

Y

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

Z

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

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| Reach out to new account list by sending an outreach email sequence to 75% of account base by end of Q1. | <input checked="" type="checkbox"/> Low to Some <input type="checkbox"/> Mostly High | <input type="checkbox"/> Low to Variable <input checked="" type="checkbox"/> 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. | <input checked="" type="checkbox"/> Low to Some <input type="checkbox"/> Mostly High | <input checked="" type="checkbox"/> Low to Variable <input type="checkbox"/> 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. | <input type="checkbox"/> Low to Some <input checked="" type="checkbox"/> Mostly High | <input checked="" type="checkbox"/> Low to Variable <input type="checkbox"/> 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. |

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the **ULTIMATE** **SALES** **MANAGER** **PLAYBOOK**

Becoming a
Successful Sales
LEADER



BILL ZIPP

Situational Sales Leadership

Follow-Up Webinar Three TBD

Do These Three Things:

1. Listen to the SSL podcasts again.
2. Complete a Sales Coaching Planner for every member of your team.
3. Read the On-on-One eBook

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You and your manager have a tense relationship. Although you would like to help more, he does not seem to recognize your expertise or respond to your interest in helping. Over the last two weeks, you have learned that your manager lacks confidence in establishing forecasts for a product line on which you are an expert. A quarterly report is due, and he has not sought your advice. Although he seems aware that he should use your help, he is hesitant about asking for it.

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- A. Talk with your manager and mention that you heard he is working on the quarterly forecast report. Be careful to avoid pushing the issue. Let him know that you are available if there is some way you can help.
- B. Tell your manager that you want to help with the forecast report. Advocate for a specific plan. Be detailed-oriented, brief, and concrete. Keep the discussion focused on your approach.
- C. Talk with your manager and mention that you heard he is working on the quarterly forecast report. Ask how the report is coming along. Delicately draw him out on the specifics on the report and ask open-ended questions that facilitate his thinking. Do not advocate for a position but work to help him reach his own conclusions.
- D. Talk with your manager about his forecast and offer your help on the quarterly report. Suggest specific alternatives and solutions that your manager might pursue on the project. Draw out his reactions to your plan and describe in detail the rationale for your approach. Stress to your manager that really all that concerns you is the success of the business.