Nutshell

Sales Manager's Survival Guide

70 Pro Tips for Hiring, Coaching, and Succeeding

When you're a sales manager, you really have two jobs.

Your first job is to manage your people. That means training and continually educating your sales reps, giving them all the tools they need to close their deals, and finding ways to inspire them when their motivation is flagging.

You don't have to be a drill sergeant, and you don't have to be everyone's best friend, either. Ultimately, you're just trying to create an environment where your sales reps can be successful, because when your sellers are successful, the company is successful. (And hopefully you'll get some of the credit.)

Your second job is to manage your sales process.* That means formalizing, measuring, and optimizing everything your team does to develop an interested lead into a loyal customer.

This job can be overwhelming because there are so many levers to pull. Any adjustments you make to your team's playbook can potentially affect their closing rate, the length of your sales cycle, your average sale price, or your company's ability to retain its customers. Fortunately, things get easier once you learn which data to focus on, and how to use that data to make positive changes.

The *Sales Manager's Survival Guide* collects the ten most-read sales management articles that we've published on Nutshell's Sell to Win blog over the past year or so. **The purpose of this guide is to help you do both of your jobs better.**

Enjoy, and please drop me a line if there's anything I can do to help.

All best,

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* You do have a sales process, right? Okay, just checking.

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PART 1:
Hiring the Right Talent

How to Hire a Sales Team: The Complete Guide

For many companies, sales teams are the ultimate growth engine—which makes effective hiring of sales reps tremendously important.

Figuring out the right time to hire, nailing down the responsibilities and expectations of the sales role, and understanding how to evaluate and select the best talent can make or break your business. And rightfully so: If you hire the wrong person, it can end up costing your company a fortune to find, hire, onboard, and train a replacement.

If your team needs to add some all-star sales talent, read on for our deep-dive on when to hire, who to hire, and how to hire.

When to Hire

Before you go in search of the perfect sales rep, you'll want to make sure it's actually the right time to hire one. New hires should be brought on not only when they're likely to make a positive impact on your business, but also at a time when you're ready to onboard them and provide training and support.

While this timing will vary based on your unique situation, there are trends and patterns you can look for that can serve as cues for when to bring in new sales hires.

Understand your buyer's behavior

If you're building a sales team from scratch, the first thing to consider is the path your customers go through when buying. How many people need to sign off on the purchase decision? Are there multiple friction points that may prevent them from doing so?

"The key determining factor is the buying behavior of your customer," says Omer Molad, co-founder and CEO of Vervoe, an advanced interviewing platform. "If multiple stakeholders need to be influenced, a sales team will be required to initiate conversations, respond to queries, address concerns, and negotiate terms."

"Sales is a channel, so the first question isn't when to hire salespeople, but rather if sales is the right channel for your product or service," Molad adds. "Some products need to be sold, while others can be marketed in a self-service fashion."

Build a structure to support your new hires

It's easy to fall into the trap of hiring your first sales person with the assumption that they'll know what to do and will be able to easily sell your product simply based on their past sales experience.

"If you don't have the structure in place to support that rep, it's a waste of money," says **David Mattson**, CEO and president of [Sandler Training](#). "Just because they have 'sales' in their job title doesn't mean that revenue is going to come flying through the door."

Sandler suggests building out as much of a structure as possible before your first hire, including a playbook, [cold calling scripts](#), and an initial sales process based on everything you've done so far, because that will help your first sales hires be successful from the start.

Related: [How to Build a Sales Process: The Complete Guide](#)

Work from your business strategy and growth plans

Another element you have to consider when hiring salespeople is your business strategy, particularly in relation to your forecasting for the year ahead.

"Most of our sales hiring requirements are driven by the business strategy," says **Tim Tolan**, CEO and Managing Partner of executive search firm [The Tolan Group](#), a member of Sanford Rose Associates. "Sales should always be tied to growth and scale of that strategy, so you should look at your planned activity for the upcoming year, quarter by quarter, and see whether or not your current sales headcount is enough to support it."

Lead flow is a great indicator of whether increasing the number of sales reps makes sense. "If you have the lead flow coming in and you can support another person on the team, that's a good sign," David Mattson added. **"You can't expect a new sales rep to bring in more**

revenue if there are no leads to get that revenue from, or if the territory doesn't support it."

Hire for new product rollouts and new audiences

If you're rolling out new products or services to the market, it may be another cue to expand your sales team. The logic here is simple: If you reassign your existing sales reps to the new products, you'll be spreading your current team too thin, and sales for your existing products may suffer as a result.

Tim Tolan also suggests hiring new sales reps if you'll be targeting a different market segment. "New product offerings will have a separate business use case and a unique value proposition, and it often makes sense to expand your team so that you can segregate your sales efforts by product and target market," Tolan says.

You have to start somewhere

The best thing you can do at any point is to test and learn. This applies both to expanding an existing team and building a new one, but it's especially true when you're hiring your first sales rep.

"Start with one sales person at a junior to mid level," adds Molad. "Set clear goals for them, then compare the results to other channels. If sales is the right channel, then it's never too early to build out a sales function at your company. For a startup, the founder is often initially the primary salesperson. **When the load becomes too heavy, it's time to look at hiring."**

Who to Hire

The traits you should look for in a perfect sales rep include a history of measurable impact in a previous sales role, as well as intangible attributes like soft skills and passion.

Here's the thing: The role of your sales team is to demonstrate how your product or service can improve their prospects' lives and make them more successful. To do this, your sellers' job goes beyond the words and statistics they say and extends to their tone and their ability to tell stories that prospects can relate to.

"Beyond the obvious things, like intelligence and role-related knowledge, you should look for reps with **grit, creativity, and the ability to empathize and understand your customer's business and problems**," says **Steven**

Benson, Founder and CEO of Badger Maps. "A great rep truly understands the uniqueness of their challenges and goals, and finds a way to communicate solutions that make prospects more successful."

Beware of the cost of a sales mis-hire

When a new sales person joins your team, you're not only investing in their compensation. You're also investing time and company resources to hire, onboard, and train them, all with the goal of increasing revenue.

If you hired the wrong person, you didn't just lose the time and money it took you to get that person on board. You also have severance costs, the lost sales they hadn't brought in, the reduced productivity of the rest of the team operating in damage control mode, and the opportunity cost of not hiring a better candidate.

According to HR Daily Advisor and SalesHacker, hiring the wrong sales rep can wind up costing your company *millions of dollars*—so here are two ways to make sure that doesn't happen.

Identify the job profile

Start by building a job profile for the sales person you want to bring to the team. A job profile differs from a job description because instead of focusing on your company's culture or product, it outlines what it will actually look like to be in the position.

"A job profile outlines how this person will actually be selling," says David Mattson. "For example, is it a six-week cycle or a two-year cycle? Is it a $6,000 product or service, or a $6 million one? Does the process involve calling the C-suite or somebody else? Is it a transactional sale, or are you looking for a hunter?"

Mattson explains that looking at a salesperson's past experiences and successes is useful, but it's the job profile that will uncover whether they're an ideal fit for the role you're looking to fill.

"For example, there was this one bank that found a salesperson who [outperformed] his quota by about 500% with a competitor, so they hired him," Mattson recalls. "To everyone's shock, the salesperson performed badly. Why? Because the bank wanted the new sales rep to bring in new business, but he wasn't able to do that because all he did at his previous job was renew and upsell existing clients. To avoid this, you need to look for the match with the job profile."

Identify the perfect candidate

Before you get to the hiring process, you'll want to filter your applicants and recommended candidates based on an ideal candidate profile. This way, you can quickly identify good matches for the position and move them to the interview stage.

To help this process along, David Mattson suggests following an acronym called **SEARCH**, which stands for:

Skills the candidate needs to have to become a top performer in the role

Experiences from their past work, including the type of prospects they're currently selling to

Attitude they use when working (e.g. What is their mindset? Can they demonstrate a collaborative attitude if the role calls for it?)

Results that they bring from their existing job

Cognitive skills (e.g. Do they do pre-call planners? Are they using a CRM, and if so, how?)

Habits they need to have

Once you align these traits with the specific job profile, you will have an easier time determining if a person is a good match for the role.

Another framework you can use is one that Hoffeld Group CEO and Chief Sales Trainer **David Hoffeld** covers in his book The Science of Selling, which includes five essential qualities that are scientifically linked with high levels of sales performance:

1. **Intrinsically motivated.** What motivates them outside of the money? Why are they in sales? Why do they enjoy it?

2. **Understanding the perspective of others.** How do they gather sales intelligence? How do they get an understanding of a prospect's motivation to buy?

3. **Integrity.** Would I want one of my children to work for this person?

4. **Growth mindset.** Do they believe their sales skills can be continually developed?

5. **Skilled in interpersonal communication.** What kind of first impression does this individual give? How do they represent themselves, verbally and non-verbally?

"When you find all five of these qualities to be strongly present with a specific person, **sales will always follow,"** says Hoffeld. And as we'll show you next, asking the right questions will help you achieve that.

How to Hire

A strategic sales team hiring process goes beyond simply asking questions, accepting the answers, and settling on the best candidate out of those who applied.

After you've decided it's time to hire a sales rep and you confidently know who you're looking for, the real work begins…

Look at hiring as the long-term strategy, not a short-term fix

Considering the steep costs of a sales mis-hire, a long-term approach is the only right way to look at sales hiring. The annual turnover among U.S. salespeople goes as high as 27%, which costs companies not only from the hiring and training perspective, but also by hurting sales.

"On average, it takes seven months to get a new hire from a starting level to a high level of competency and performance," says David Hoffeld. "That's seven months you're investing in this person, and if they're not a top performer, the impact of the investment and lost sales is just staggering."

"That's why we can't rush things in our hiring process. We identify the right person, and we wait for him or her. **The biggest struggle companies have is wanting that sales person today,"** Hoffeld adds. "If you hire the right salespeople, success will come quickly and for a long period of time. If you hire the wrong people, you have to fix that mistake, and it might take you a solid year and a half to do so."

Hoffeld suggests shifting away from the hiring approach that typically involves a job posting, a number of candidates who applied by a certain date, and picking the best out of those. This often acts as a short-term fix. Instead, you should wait for the candidate that fits every element of your job profile—even if takes months longer—because it will pay off for years.

Use the 'reversing' technique

By now, you have your candidate profile and you've committed to waiting as long as you have to in order to hire the right person—so how are you going to test your candidates? What are the specific steps you can take to discover and identify those perfect sales hires?

David Mattson suggests a technique called **"reversing."** It's a strategy that reverses the flow of information from candidates to you rather than from you to the candidates, and it's a way to uncover the true intent behind a response or a question.

"For example, an ineffective interviewer will say something like, 'One of the important skills we're looking for here is prospecting. How do you feel about that? What are your prospecting skills like?'" Mattson says. "The candidate

knows what you expect to hear, and they'll tell you that. **It's as if you held up a billboard that told them what to say.**

"Instead, reframe the questions so that they need to speak about their experience and about real examples. **It makes it harder for them to come up with a rehearsed answer.** If you ask them about the ways they get clients at their current job and their answer is 'From a lot of different places,' you peel back the onion and ask a follow-up," Mattson explains.

"I'd then ask them about their most recent 10 accounts and where they came from. Really narrow in on specifics. You know those questions about handling difficult situations, or overcoming a challenge? We all know them, and everyone has a standard response ready to go. So, you peel back the onion again and ask them to clarify their answer, because **no one usually rehearses further than that one response, and the truth comes out.**"

You can also use the reversing technique when your candidate asks you a question. "Let's say the candidate is wondering how they'll get leads at your company. A bad response would be to explain a good marketing strategy you

have in place," Mattson says.

"Instead, you can say 'Great question. How do you get your leads now?' The candidate might say, 'I have to get them myself and it's harder since we're on commission.' You can follow up with, 'How would you like to generate leads?,' and if the candidate responds with something like, 'I think creating leads isn't the best use of my time, the company should secure them,' you'll know how this person feels about prospecting and you'll be able to compare it with the job requirement."

Get the sales team involved

When you're adding new members to your sales team, it's crucial to get the entire team involved in the hiring process. While hiring for a sales position recently, Steven Benson learned first-hand the value of having the candidate get to know the type of people they'd be working with and decide if it would be a good environment for them.

"By the time the candidate did their final round of interviews with me, they were able to very clearly articulate why they were a good fit for the company," Benson recalls. "Also, I could tell they were really excited about the role, partially

because they had liked what they heard from the team."

Benson also recalls a situation in which a salesperson was hired despite a team member highlighting reasons why the person wasn't a strong fit. "The hire ended up not working out well, and the reasons that the team member brought up earlier were valid. Situations like this can have a negative impact on the team, so it's very important to take their feedback into consideration," he added.

Ready to start hiring? Understanding your company's unique needs and defining a strong job profile are always the best first steps to take. If you can commit to continuing your search until you find the perfect sales rep for each specific sales role, you'll be well on your way to the long-term success of your growing sales team.

Sales Rep Onboarding: 6 Ways to Increase New Hire Productivity and Engagement

Even if your hiring process is bringing in the right talent, you can't expect your new rock-star sales reps to succeed without an equally effective onboarding plan.

Generally speaking, **employee onboarding** is the process of training a new team member and integrating them into your organization.

Onboarding sales reps can include typical best practices like having them review your employee handbook and attend orientation meetings, but it should also incorporate training and engagement elements to better acclimate new sellers to their surroundings and responsibilities.

Research shows that properly onboarding new sales reps is important because:

- **It increases retention:** The average turnover cost per sales rep is $97,690 when you add up recruiting costs, training costs, and lost sales. Employees are 60% more likely to remain with an organization for three years or longer when a standardized onboarding process is used. Translation: It's expensive to hire new sales reps, and it's much more cost-effective to retain the ones you have.

- **It boosts productivity:** Starting a new job is fraught with productivity pitfalls. "How do I perform this task?", "How do I access that tool?", and "Why do we do things this way?" are all common questions that new sales reps will ask. A successful onboard-

ing process can boost new hire productivity by 25% by answering those questions efficiently.

According to the Society for Human Resource Management, a proper onboarding process should accomplish three main objectives:

Acclimate

Making a recent hire feel comfortable in their new position requires more than simply handing them a parking pass and pointing out the location of the restrooms. They need to understand your company's mission, what's expected of them, and what kind of support they can expect from the company.

Engage

Multiple studies have proven that engaged team members are more productive and less likely to seek employment elsewhere. The onboarding process is the perfect place to bolster employee engagement and help new sales reps establish relationships with other staff.

Retain

As we just mentioned, engaged employees are much more likely to stay with your company

long enough to pay for themselves. A successful onboarding process greatly increases your organization's chances of retaining its top talent.

Now that we've convinced you of the importance of onboarding, let's dive into some expert-approved tips for onboarding new sales reps. Implement these strategies and you'll see new hire engagement, productivity, and retention rise in your sales department.

1. Have a Standardized Process

The first thing you need to understand about onboarding new sales reps is that it isn't a one-day event; it's a process that can last six months to a year. (Really.)

With that in mind, you need to define and standardize an onboarding process that's designed for the long-term. What specific actions does each new hire need to complete in the first week? Which training courses do they need to complete in the first month? What should they hope to accomplish within the first quarter?

"Our sales team members are the face of our

company in the market, and it's so important to set them up for success," says **Deborah Hanamura**, Executive Director of Sales & Marketing for Paladino and Company. "We created a structured onboarding checklist with recommended time periods so that we can begin to schedule the onboarding activities before the new team member even starts:

- **The early days emphasize company culture** and include meetings with leaders from each sub-team or division in the company. We cover foundational lessons about our brand, service offerings, company history, and additional context to help them understand the company better.

- **The next phase moves into products and services education.** We review product descriptions, sales playbooks, and scopes of work for standard projects.

- Once they understand the company and its solutions, then we move into a **deep dive into the markets we serve, our client segments, and buyer personas** so that they can understand how those buyers will relate to each offering from their unique perches.

"The process is methodical and emphasizes a deeper understanding of our services over getting someone into market as quickly as possible," Hanamura explains.

In short, you should analyze your current onboarding process (or the onboarding process you hope to implement if your company doesn't have one yet) and identify specific events every new sales rep can be taken through, then make them the standard for all hires.

2. Put It All in Writing

A new sales rep can't be expected to retain 100% of the knowledge that they're presented with during onboarding. It always helps to have some resources and reference guides that they can use to refresh their memory on the fly.

"Before a new rep comes on board, the company should work to build a document filled with FAQs about the company and the role, compiled using questions that previous employees and customers often ask," advises **Kraig Martin**, Commercial Director at Storage Vault. "This will be a permanent and physical point of reference for them should they need help with routine questions."

"Developing sales process and intelligence documents will save your new reps from lots of wasted trial-and-error in their first month or two on the job," adds **Jeff Kear**, Owner of Planning Pod. "You should equip your new reps with sales objection documents that provide them with the most common objections that you hear from prospects and the best ways to respond to them. This way they aren't surprised by any responses they get from prospects and can respond quickly to many objections.

"And you should definitely make sure your new reps have a complete array of phone scripts and email templates that they can start using out of the gate," Kear adds. "These scripts should cover most of the touchpoints during a typical sales cycle. Most good reps will customize these later on to fit their style, but providing them with these resources upfront gets them up and running much faster."

3. Set Clear Expectations

In order for new hires to be successful, they have to know what's expected of them. The onboarding process is the best setting to deliver these essential details and get new employees acclimated to their work environment.

Start with your organization's overarching mission: What are the corporate goals that the entire team is working towards and how will the new sales rep help achieve them? The better they understand this, the better equipped they'll be to have a positive impact on the company sooner.

For instance, perhaps your sales department is committed to increasing sales numbers by 20% this year. After doing the math, your team knows that it needs to close an average of 15 more deals every month. This is a tangible goal your new sales rep can help contribute to immediately.

After company goals, move on to individual milestones you expect them to reach by specific dates, whether that's an amount of new revenue, a number of new clients, or (if you're an SDR) a number of qualified leads passed on to

your closers. Creating 30, 60, and 90-day plans will keep new hires on track and ensure they don't get overwhelmed by all the information being delivered to them.

"When setting expectations for new sales reps, you need to be totally realistic," Kraig Martin says. "Base your targets on the work that previous new hires have done, balancing this out with the achievements of your existing staff. Account for the length of the sales cycle in your target creation so that the goals are reachable."

Related: How to set quotas that don't sink your sales team

Setting clear expectations is essential, but don't forget to share what new recruits can expect from your organization as well. Let them know that you (or someone else on the team) will be there to help them and answer their questions. This will alleviate feelings of anxiety and make sure they engage in their new position without feeling overwhelmed.

It also creates an environment where both you and your reps are held accountable. As 3dcart COO **Jimmy Rodriguez** puts it, **"You will provide all the tools they need to step up to**

the plate, but it will be up to them to hit the homerun."

4. Take Your Time With Training

You've worked hard to hire highly skilled people, and your newest sales rep has a history of success and valuable experience. But that doesn't mean you can simply throw them into the deep end on their first day and hope they start making sales.

New sales reps, no matter how talented or experienced, need to receive proper, personalized training when they're first hired. They need to learn how your company's products work, the sales process your team follows, and who the major players in the industry are.

"The worst thing you can do is hire a salesperson and rush them out to market without integrating them into the business," warns Deborah Hanamura. "It's important that your training is efficient but it's also important that it not be rushed. If you take the time to have in-depth conversations about the most important issues early in the onboarding process, you will have a better long-term result because the rep will understand the processes and implica-

tions that come from a sale. They will feel like they are part of the organization, and not just a nameless person going after a target."

According to Jimmy Rodriguez, the complexity of your product should influence the type of training you offer to your new reps. "Our particular product is a software that has many unique features and benefits so we have to ensure that each of our reps is familiar with them," says Rodriguez. "Outside of dedicated class training on the product, **we also have our sales reps spend the first few weeks as customer support so that they encounter different customer personas and product questions."**

> 💡 **PRO TIP:** If your organization uses Nutshell or another CRM platform with sales automation features, you can use the software's automated tasks and reminders to provide constant guidance on your company's sales process and the exact actions that a rep needs to take on a daily basis. Having step-by-step directions like this makes it easy for new hires to get up to speed.

5. Partner New Reps With Veteran Team Members

Allowing new hires to shadow veteran salespeople as they interact with customers, give demos, and close deals is a great idea. Pairing them with specific mentors within the sales department is an even better one.

This process must be handled with care, though. Your top sellers might not have the time or the patience to mentor new recruits, and matching a new hire with the wrong mentor can actually have negative effects. Look for experienced sales reps who have the necessary skills and insights, but also a natural ability and desire to teach and develop new hires.

After you've identified a suitable mentor for your new rep, involve them in the onboarding process as soon as possible. The earlier they can begin building relationships with your new sales reps and training them on the inner workings of your company's sales processes, the better.

"The new sales rep should have the opportunity to observe the experienced rep in action, noting down tips and tricks to employ in their own work, rather than spending long periods of time employing a trial-and-error approach to their sales technique," says Kraig Martin. "The experienced rep should be approachable and should regularly check in with the new rep, at least weekly, to see how they are getting on."

For new reps, the mentorship process should include not just watching experienced sellers, but also having those mentors present when they're ready to set off on their own. "It's one thing for new hires to watch veteran sellers, and another thing for them to handle the calls themselves with the support of an experienced teammate," says **Deborah Sweeney**, CEO of MyCorporation. "If we give a new rep too long to onboard and sit and listen, they become more and more nervous to jump in. **Having team members there to back up the new rep as needed is a great way to train sales reps quickly and force them to get on the calls early."**

You may also want to have your new sales reps shadow team members in other customer-facing departments. "One great onboarding strategy that has worked for us is to have a new sales rep shadow an existing rep

for two days, followed by shadowing a customer care specialist for two days," says Jeff Kear. "Shadowing the sales rep is just common sense, but **we have found that shadowing one of our customer care reps gives them valuable insights into many of the issues and challenges that crop up with customers after the sale is made**. This knowledge can help them better identify the best customers for our product during the sales process and give them a better sense of how our customers converse on a day-to-day basis."

6. Optimize Your Onboarding Process

Properly onboarding new sales reps is a process that needs to be optimized over time. It's highly unlikely that you'll adopt the perfect approach right out of the gate. That's okay, as long as you're willing to continually analyze your onboarding efforts and optimize them for greater future success.

Ask yourself questions like: "Are our company goals being helped by our current onboarding process?", "What processes can we automate for greater productivity?", and "Is the sales mentorship program we've implemented working as it's supposed to, or is not worth

the lost productivity of our veteran sellers?" Answer these questions honestly and adjust accordingly.

You should also look at the impact on "leading metrics" that your new hires are having, from calls booked to deals closed. **"Track the things that end up in revenue based on your sales cycle,"** says **Tarek Alaruri**, Co-Founder at Fairmarkit.

Also, don't be afraid to ask your new sales reps for their feedback on how the onboarding process is going. Listen to their opinions on what your company could be doing better in this critical early stage. Not only will this provide you with valuable information, but it will also make your employees feel valued and more engaged.

"Feedback from the sales rep is the best way to understand if the onboarding process is working," says Deborah Hanamura. "Are they connecting the dots between the company, market need, and target customer? Are they recognizing the impact that a sale has on the business? Do they interact with the team independently without prompting, showing they are part of the company in a meaningful way? Our

sales cycle is long and complex, and **we generally don't see the impact in sales immediately, so we need to look for other signs that the onboarding process is a success."**

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Featuring keynote presentations by world-class sales coaches and CRM pro tips from Nutshell's own leadership team, the first-ever BOUNDLESS was a smash success. Watch the full replay and get inspired.

TAKE ME THERE

PART 2:
Coaching Your Team

Five Tips for Holding a Productive Sales Team Meeting

Most people find meetings to be a painful experience—and not without reason.

Meetings often lack an agenda, purpose, or direction, and on top of that, they're usually inconveniently scheduled and easily get off track.

Salespeople typically detest meetings because they take time away from what they'd rather be doing: calling prospects, scheduling appointments, and closing deals. And since time is money, every minute a rep isn't on the phone or meeting with clients is a minute wasted because they aren't generating commissions.

Of course, no organization can completely do away with meetings, so you've got to find a happy medium—one that supports the company's goals while also providing value to your salespeople.

Read on for our top five tips on how to hold a sales team meeting that's actually worth everyone's time.

1. Make the Meeting Convenient

The biggest hurdle when scheduling team sales meetings is finding a time that works for everyone. Monday morning meetings can be disruptive, since sales reps are more concerned with returning their prospects' calls or contacting any new leads that came in over the weekend.

Instead, **schedule your weekly meetings for**

Tuesday or Wednesday afternoons. That way, people who have a habit of showing up late to work or skipping meetings due to morning phone-catchup have no excuse.

Keep in mind that salespeople are always frantically busy near the end of the month or quarter, so be a little flexible around those critical times; if your company's financial goals are dependent on your reps staying on their phones the last day of the month, the weekly meeting can wait.

> 💡 **PRO TIP:** If you want to maximize attendance, offer incentives. Providing free lunch or coffee is a super-simple way to boost attendance.

2. Ensure Your Meetings Are Purposeful

One of the biggest let-downs for employees is spending an hour in a room listening to their manager drone on and on, only to walk away not knowing why they were there in the first place. **Everyone should leave your meetings knowing exactly why they needed to attend, and what their next steps are.**

Get your team up to speed fast.

Want your new hires to be more productive in less time? Nutshell's sales automation tools reduce the learning curve for your reps by showing them exactly what they need to do at each moment.

LEARN MORE

When your sales reps repeatedly leave your meetings wondering why they attended, they'll be more likely to skip future meetings, indulge in distracting activities (like being on their laptops or phones), or steer the conversation off-topic.

Some legitimate reasons for a sales meeting are:

- Reviewing sales numbers and other key performance indicators from the previous week, month, or quarter

- Planning ahead for the coming week, month, or quarter

- Providing a forum to answer the sales team's questions

- Assigning specific tasks or forming special teams for upcoming projects or challenges

- Sharing insider knowledge, tips, scripts, or templates that your reps can use to maximize their time selling

Related: Check out marketing extraordinaire Seth Godin's "Whose Meeting Is This?" checklist and see if your next meeting hits all seven criteria.

3. Recognize Greatness and Encourage Feedback

Working in sales can be challenging and stressful, so taking a moment to recognize hard-fought battles, new deals, and other wins can really motivate your team.

Treat every win like it counts, no matter how big or small. **Call special attention to sales reps who are crushing their numbers,** since it not only boosts morale but shows others that those goals are attainable. Taking even just a few minutes to celebrate with your team at the beginning of your meeting can make the rest of your agenda easier to swallow.

Lastly, go beyond praise by asking any goal leaders or experienced salespeople to share a suggestion or two with the team. New sales tactics and feedback can go a long way towards getting people to attend and pay attention.

4. Stick to the Schedule

Before the meeting, you should designate a certain timeframe for specific subjects, and consider pushing items to another meeting if they take too long to cover. On top of that, be considerate of other people's time by not letting employees ramble or get off topic for too long.

If individual issues and conversations take up too much of the team's time, then consider conducting mini one-on-one meetings with individual salespeople throughout the week. (More on that in the next chapter.) These mini-meetings are the perfect opportunity to discuss personal concerns and questions or conduct specific training, freeing up meeting time for more pressing topics.

Maximizing attendance and productivity is all about sticking to your schedule. **The last thing you want to do is let meetings creep past the allotted time, because it tells your team that you don't respect their time.** If you let meetings run long, even by a few minutes, you could be inadvertently interrupting scheduled calls or meetings your salespeople had planned,

costing them sales or forcing them to break precious promises to customers.

5. Invite Decision-Makers and Provide the Right Tools

Meeting productivity relies on bringing the right people with the right tools together in the right place so decisions can be made. Make sure you end meetings with action items so that everyone knows what to bring for the next meeting. Clearly outline what the expectations are as they relate to customer or prospect cultivation. On top of that, it wouldn't hurt to send out a reminder before the next meeting so no one forgets their task.

It's also a good practice to start integrating your meetings with other departments if their input is necessary to create a plan or make decisions on certain subjects. At the very least, invite representatives from your marketing and product teams to your weekly sales meeting, so they can be aware of your team's strategies and concerns, and offer assistance as needed.

Holding a productive sales team meeting isn't rocket science, but it definitely takes a little

finesse, some consistent tweaking, and a dash of luck. With enough foresight and planning, you can turn your sales meetings into productive sessions that your team actually looks forward to.

Expert Advice: What Should a Weekly 1:1 Sales Meeting Look Like

A 1:1 sales meeting provides sales managers and sales reps time for reflection and goal setting, as well as an opportunity for both sides to raise their concerns.

As a manager, you shouldn't look at your weekly individual meetings as simply a time to go over sales numbers. Your responsibility is to foster professional development for your reps, and arm them with everything they need to be successful in your organization.

So, what makes an individual meeting between a manager and rep truly effective? We gathered advice from six sales professionals on what a 1:1 sales meeting should look like and how to maximize the face-time you spend with your reps.

1. Start by listening

1:1 sales meetings are an ideal time to learn for sales reps and sales managers alike. Both parties should go into these meetings ready to listen and work together.

"The sales manager's job is to provide resources and guidance to each salesperson," says Diane Helbig, Business and Leadership Development Advisor at Seize This Day. "The only way to do this effectively is to first **listen to what they are experiencing**. That way, sales managers can address specific items with that salesperson."

Helbig stresses the importance of making these meetings unique to each of your sales reps. "It's not a one-size-fits-all sort of thing," she says. "People work in their own way and have their own unique needs. They require different levels of assistance and attention.

Effective sales managers understand this and approach their 1:1 sales meetings with this in mind."

The moral of the story? Before you create a mental checklist of all the things you want to accomplish in your one-on-one meeting, start by listening. This will ensure that you're addressing the specific needs and concerns that are coming up for your salespeople, some of which you might be completely unaware of. Listening gives you a better picture of what's going on in your business and makes your individual meetings more collaborative.

2. Focus on skill development

"You're only as good as your last performance" is a common attitude in sales, and it's one that causes undue stress in many sales reps. Without ongoing professional development, it's hard to beat that "last performance" or acquire the tools that will help you improve as a seller.

Sales professionals at all levels can benefit from sharpening their skills. Managers should focus on coaching during their 1:1s with reps, and put effort into understanding their reps' baseline skill levels and identifying what needs work.

"You should take the time to **evaluate and sharpen your salespeople's critical thinking skills,**" advises Carol Archebelle, a former advertising sales manager and current Digital Media Manager for Foundations Wellness Center. "For instance, your salespeople need to know how to size up potential prospects: Are they a good fit for what we are selling? Can they afford it? Are we asking them to switch from someone they are currently doing business with or would this be new for them? If it's a switch, how can we do better? If it's new for them, how do we demonstrate value?"

The 1:1 meeting gives sales managers a valuable opportunity to coach to individual needs, in a way you can't with a team meeting. Each rep will have their own strengths and weaknesses in sales, and may need coaching in different areas.

3. Discuss and understand your reps' motivators

We all have different motivations, and what drives us can have a huge impact on how we perform professionally. Sales managers should use their 1:1 sales meetings to better understand what their reps are motivated by.

"Managers need to coach their reps based upon their 'Push' and 'Pull' motivators," says Cynthia Barnes, Founder of the National Association of Women Sales Professionals. "Push motivators are those that encourage us to accomplish basic survival goals (paying the rent, buying groceries, etc.). Pull motivators, on the other hand, draw us to a higher level. Once a rep is secure knowing that his/her basic needs are met, those same push motivators will not propel them to the next level."

Knowing your sales reps' motivators will help you unlock their true potential. This point is often overlooked, but it's one of the most critical factors in sales success, since motivation has a huge impact on how sales reps work. As Barnes puts it, **"Someone who's worried about whether they're getting evicted next month isn't thinking about the President's Club or being on top of the leaderboard."**

4. Look for new opportunities

A 1:1 sales meeting is more than a chance to discuss what's working and what isn't. It's also a chance to look for new opportunities for improvement and growth. You might think you don't have time to do a 1:1 meeting with each

rep, but in reality, managers benefit from this process as much as their reps do.

According to Steven Benson, Founder, and CEO of Badger Maps, "The manager benefits from this regularly scheduled touch-base because it allows them to gather the information they need to update their forecasts for accuracy. They can learn which deals are progressing faster or slower than expected, and which ones are new, closed, or lost. More importantly, the manager can spot patterns that uncover opportunities for improvement for the whole organization."

Of course, there are plenty of benefits for reps too, as it gives them a different perspective on the entire process. "It's a great excuse to step back and look at all the deals from a zoomed out view, which inevitably reminds the rep of some deals that need attention," Benson continues. "Also, it allows them to spend a few minutes and get a fresh pair of eyes on their territory. **Salespeople have their fingers on the pulse of where deals are at, how the company is doing in comparison to its competitors, and what the customers want from the company."**

1:1 sales meetings present a regular opportunity

to open the lines of communication between the sales manager and each sales rep, which leads to new ideas and improvements of the team's sales process.

5. Provide resources

Another important thing sales managers should be ready to do in 1:1 meetings is provide tools and resources to make their reps more successful.

Heather Vreeland, Owner of Occasions Media Group shares how she begins each 1:1 meeting. **"Before I ever get started with what I need, I ask them 'What do you need from me?',"** Vreeland says. "I ask what obstacles are they currently encountering with their prospects, and then we troubleshoot together from there. I want them to start their week with their coach and feel empowered to overcome the inevitable 'Nos' of sales so they can charge through without disappointment to the 'Yeses.'"

Sales managers can make the most of 1:1 sales meetings by supporting their reps in anything they might need. These meetings are about goal setting and accountability, but they're also for learning about what your reps might be

lacking and what roadblocks you can clear out of their paths.

6. Have a little fun!

The weekly (or monthly) 1:1 sales meeting doesn't have to be a total bore. Sales professionals should use this time to connect with each other and humanize the process. Everyone needs a minute to breathe, and a 1:1 sales meeting should allow for that as well. In fact, according to David Goldsmith, Sales Manager at ezCater, having fun can actually make these meetings more productive.

"We work hard, all day. When I let each member of my team know through my actions that I'm not taking myself too seriously, they will follow suit and loosen up. This leads to more productive conversations, more transparent feedback, and a meeting culture that is far more attractive than its counterpart.

"It's a rallying cry to lead by example," Goldsmith continues. **"If I'm prepared, if I'm transparent and communicative, if I'm ready to commit, if I'm having a great time—my sales reps will be too."**

Related: How to use Slack to motivate your sales team

Bottom line, make sure that you're using these individual sales meetings to energize your sales reps. Your goal for these meetings should be first and foremost to motivate your reps. 1:1 sales meetings should leave your reps feeling good about themselves and about their work. One of the best ways to make that happen is by making the meetings a little more relaxed.

Got any other tips for holding a productive 1:1 sales meeting? Tweet us @nutshell and share your best tips! 🔥

See the big picture without missing the details.

Nutshell helps sales managers unearth the buried treasure in their business. With our suite of reporting tools, you can track your team's progress, forecast your future sales, get instant insight into the status of every deal, and lots more.

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What Should You Do When Your Sales Team Is Underperforming?

It's a tale as old as time: Your sales team isn't meeting its goals.

You thought you hired the right people and that everyone was a good fit for the company, so why aren't they exceeding their quotas?

Sometimes the issue is the employees them-selves, but many times something outside their control is to blame. We've compiled six of the best strategies for improving sales rep perfor-mance based on real-world research and case studies so you can get back to hitting your benchmarks in no time.

1. Get to the root of the problem

When your car breaks down, it usually isn't the best idea to try replacing the transmission yourself without first consulting a mechanic. The same can be said of fixing an underper-forming sales team. Determining the source of the problem is just as important as prescribing a solution.

One of the ways Toyota became the sixth-larg-est company in the world by revenue was through its tradition of asking "why" five times to get to the root of a problem. It's a technique that has just as much usefulness in the sales room as on the factory floor.

Here's an example of this in practice:

"My sales team isn't meeting their quotas."

1. **Why aren't they meeting their quotas?**
   "They aren't closing enough sales."

2. **Why aren't they closing enough sales?**
   "They always seem to be focused on clos-ing deals but forget to fill the pipeline."

3. **Why aren't they filling the pipeline?**
   "They dislike cold calling prospects."

4. **4. Why do they dislike cold calling?**
   "It takes a lot of time and effort to find inter-ested potential customers."

5. **Why does it take a lot of time and effort?**
   "Because we don't have a system for quali-fying prospects before we call them."

Whether you ask three times or ten times, persistently asking "why" helps you move past the flawed assumption that your sales team is underperforming because they are lazy or unskilled. Now you're left with a problem that has a relatively straightforward solution.

2. Have a formal system for qualifying leads

As "Mr. Inside Sales" Mike Brooks put it, "you can't close an unqualified lead." One of the most common reasons why sales teams under-perform is the lack of a formal prospect qualifi-cation process—or the lack of a sales process altogether.

Having a system for qualifying prospects elimi-nates the guesswork of who to pursue and who to say "no" to. Start by:

- **Identifying your ideal customer:** Knowing exactly the sort of person you're selling to and then communicating that vision to your team members is the first step, but don't forget to regularly evaluate and update that customer persona as trends and markets change.

- **Prospect research:** Once you capture a name and email addresses through your website, you can do online research before making first contact, to personalize your outreach and confirm that they'd be a good fit for your product. (See also: warm calling.)

- **Utilizing lead scoring:** Many CRM platforms can help you identify quality prospects. Some do this by analyzing visitor behavior on your website and generating a lead score based on the parameters you set.

Once you have an automated process in place that identifies who is most likely to convert, your team can quickly follow up and keep their pipeline full of quality leads.

3. Document and optimize your follow-up process

In addition to qualifying leads, having a well-documented follow-up process prevents a rep from wondering what to do next. A CRM platform can automate much of this process and remind your reps who they need to contact and when.

Related: How to write a killer follow-up sequence that draws replies

CRM platforms also make it possible for managers to track and analyze data around all the team's accounts so that they can hone in on which follow-up strategies work and which ones don't.

By establishing clear processes at every stage of the pipeline, your team has a better chance of performing consistently and meeting their sales goals.

4. Rethink your compensation strategy

After working in the field and seeing ineffective pay schemes for reps firsthand, Harvard Business School Associate Professor Doug J. Chung went on to study how companies should pay salespeople. His findings went against many of the ways that companies traditionally pay their reps.

For starters, Chung's research suggests that many compensation strategies used by big companies, such as caps on commissions and increasing sales quotas for high-performing reps, may actually hurt long-term results.

He also supports the use of a pay system that is uniquely tailored for each individual, with different components and bonuses in place to keep high-performing, average, and low-performing reps engaged.

Want to explore tailoring sales incentives for individual members of your team? Sales and management training company The Brooks Group suggests the following tangible and intangible incentives:

- **Physical prizes:** The latest technology or accessory has the added bonus of reminding the rep of their achievement each time they look at it.

- **Recognition:** A mention in a newsletter or at a company-wide function (or shouting them out on Slack!) may be enough to remind team members that their work is appreciated.

- **Extra time off:** Bonus vacation days keep reps feeling refreshed and ready to be fully engaged at work.

- **Expenses-paid vacations:** These more expensive prizes are ideal for long-term motivation, or you can adjust it for smaller budgets by

offering a nice dinner or other experience to team members that meet their quotas.

In every case, keep the personalities and preferences of your individual reps in mind. What motivates one person may turn another off.

5. Prioritize cooperation over competition

Sales gamification is a common strategy for increasing productivity. However, outright competition isn't always the most effective technique for team productivity.

In one case study, a company with an international sales group pitted reps targeting one country against reps selling to another. When one team began to pull ahead, the low-performing reps were quick to assume that the problem was the market in their target country. As a result, their motivation stalled.

The CEO's solution? He took the highest performing reps from the star teams and sat them next to the reps of the low-performing countries. By being in close proximity to the high-performers and learning some of their sales techniques, teams were able to turn their productivity around and began outperforming within weeks.

Instead of investing in a gamification model that pits your sales reps against each other, consider prioritizing collaboration in order to close more deals. Cooperative sales culture is not only essential for maintaining a healthy, enjoyable work environment for your employees, it can also help increase the overall productivity of your team.

6. Refine your product

Your reps have likely heard a lot of feedback from customers—both good and bad—about the product or service they're trying to sell. And let's face it: No amount of sales finesse can truly make up for a flawed product. In this situation, your company may have to invest more into your product development and customer service team.

It might also be wise to take it one step further and ask your sales team for feedback during product development. They've been on the front lines and likely have an intimate understanding of customer opinions and market trends.

Not only will your product or service better reflect customer needs, but reps will feel a little more ownership over your product offerings, which can translate into a more authentic and effective sales experience.

Small improvements make a big difference

Having an underperforming sales team can be a frustrating situation, but turning things around is often easier than you think. Getting to the root of the problem and taking a creative approach to fixing obstacles for your team can quickly deliver the results you're looking for.

Investing time into exploring the causes of your team's performance will pay dividends. It will also lay the foundation for better processes and company culture that will remain long after your current reps have moved on and new employees join your team. 🔥

How to Coach Your Sales Team Like Bill Belichick

Love the Patriots or hate 'em, you can't deny that Bill Belichick is one of the most effective coaches in football history.

Belichick is the only NFL head coach with six Super Bowl wins, and under his direction the Pats have won nine AFC championship titles. Clearly, the man knows how to lead a team. In fact, he's an easy contender for greatest football coach of all time.

Belichick does what every sales manager wants to do: **lead his team to victory consistently.** Perhaps the biggest reason for his success is that Belichick sees his team as a complete unit, not a collection of disparate players. He focuses on what they can do together, and understands how to leverage their combined efforts.

"On a team, it's not the strength of the individual players, but it is the strength of the unit and how they all function together." - Bill Belichick

Salespeople typically make their sales alone, but your job as a sales manager is to **maximize what your team can be together and coach them to a collective victory for the company.** That means knowing what each member of your team needs to be successful and setting them up for victory.

Here are five ways that sales managers can walk in Belichick's footsteps and put together championship-level sales teams.

1. He over-prepares his team for the game

The day after winning Super Bowl LI in February 2017, [Bill Belichick gave a quote to reporters](#) that sums up his character better than anything: **"As great as today is, in all honesty, we're five weeks behind 30 teams in the league in preparing for the 2017 season."** That's what preparation means to Bill Belichick. Everything else is a distraction—even the victory itself.

Bill Belichick begins preparing his team for Sunday's game on Monday morning. He and his assistants spend [hours and hours](#) watching videos of the other teams they play so that the Patriots can go into each game ready to face the exact challenge they're going to be met with that day.

Proper preparation means no surprises for your players when it's time to compete. Sales managers can mimic this level of preparation in a few ways:

- Regularly drill sales techniques by running role playing sessions.

- Ensure that your team members are sufficiently prepared for important pitches by helping them research their prospects and accounts.

- Keep your team members thoroughly up-to-date on your own product and service offerings by updating them whenever changes occur and making sure those changes are understood.

2. He treats star players and rookies the same

Belichick is famously tough on his players, no matter who they are or how much (or little) is at stake. While coaching the 2007 Pro Bowl, Tony Gonzalez, one of the best tight ends in football at the time, was assigned to the special teams unit during the opening kickoff and coasted through the play without blocking anybody. [As the story goes](#), Belichick let Gonzalez have it over the lack of effort:

"Why don't you (bleeping) block somebody Gonzalez," Belichick grumbled as Gonzalez jogged by...

Gonzalez felt himself fuming. This was how the great Bill Belichick treated people? They were at the Pro Bowl, for crying out loud... this was supposed to be a reward, a way to honor Gonzalez for working absurdly hard and having another extraordinary season.

And this was what he gets? To have the game's most famous coach swear at him for not blocking on special teams in an exhibition game?...

He stewed on the sideline, furious. And then it was time to go back on the field for another kickoff, another special teams moment, and the ball was kicked. Gonzalez locked in on a guy running down the field. "Why don't you (bleeping) block somebody?" OK coach, fine, check out this block.

And Gonzalez absolutely mashed the defender, taking him completely out of the play.

Then Gonzalez walked over to the sideline, and you better believe he walked right by Belichick, wanted to see the grimace wiped right off the man's face. But Belichick showed no signs of even noticing him. He was looking out on the field, seemingly oblivious to Gonzalez's presence. So Gonzalez kept walking. And as he was a few steps away, he heard Bill Belichick say this: "Nice block, Gonzalez."

He looked back, and there was no hint of

a smile on Belichick's face. Bill Belichick just kept looking at the field, and in that moment Tony Gonzalez understood. **The man had coached him into blocking on special teams in the Pro Bowl.**

Belichick could have easily let the incident slide: Gonzalez was a star tight end assigned to a duty he could do in his sleep while competing in a game that has about as much significance to NFL players as a game of pick-up football. But Belichick called him out just like any rookie, and got Gonzalez to step up to the plate.

The takeaway for sales managers is that **you should never let your top salespeople rest on their laurels**. Just because they can do something in their sleep doesn't mean they always will. Take the time to go over the basics with your top people just like your rookies, and call them out when you know they're giving less than their best effort.

3. He focuses on the next play

Belichick once said in an interview with CNBC that he is a short-term thinker. "We can only control what we can control in the short-term, this week, our next opportunity, so that is

where we are at," he said. Belichick emphasized in the interview that during games, **he doesn't think about the outcome of the game—he thinks about the outcome of the next play.**

Sales managers do have to think somewhat long term. You have to develop goals for your team often a year in advance, after all.

But when it comes to working to improve your team's results, take a page from Belichick and focus on the next play. Coach your team members through their next phone call, pitch meeting, or cold email. Help them to find success in the now, and over time they'll have a string of successes that develop into more closed deals.

4. He analyzes each player's performance

Belichick stays on top of each of his players' performance week to week, month to month, and season to season. He notes when they're performing well, and when they could be performing better. He uses what he learns during their good performances to help coach them through their rough patches.

In analyzing his players' performance, Belichick uses a combination of quantitative and qualitative data. His system of making sense of that data involves hyperbolic delay discounting and requires its own post to get into, so I recommend checking out this fascinating article on Belichick's performance analysis methods.

One simple way sales managers can run quantitative analysis on their team members is by utilizing a CRM activity report. A CRM activity report gives you a ton of useful data on such things as:

- Your reps' number of logged activities compared to your established quotas for each activity type

- The amount of time your reps are spending on each activity

- Your team's activity effort compared to a previous timeframe

The data you find in a CRM activity report helps you pinpoint your team's strengths and weaknesses so that you help coach them through areas they're struggling with.

Combine that quantitative data with the qualitative data you've seen play out through experience and you'll have an excellent idea of how your team members are performing and how they might be able to improve.

5. He builds a culture of trust

Belichick is well aware of the fact that his players are more than just X's and O's on a whiteboard—that they have separate lives outside of his team, and that their lives affect how they perform. He goes out of his way to help his players in their non-football struggles, too. "The more you and the organization can help take care of personal situations, the smoother the ship runs on the football end," Belichick said in a 2017 interview.

He doesn't stop there, though. Belichick is also known for bringing his team together for bonding activities like trivia nights, to help his players grow closer and learn more about each other.

Sales managers should follow Belichick's example: **Make sure you know what's happening in the lives of your team members.** Be willing to support them through tough times at home

so that they can focus on getting through their work. You can also promote a team culture of trust by organizing happy hours, trivia nights, and other team-building events outside of work. Just because sales people typically work their deals alone doesn't mean your team shouldn't have faith in each other.
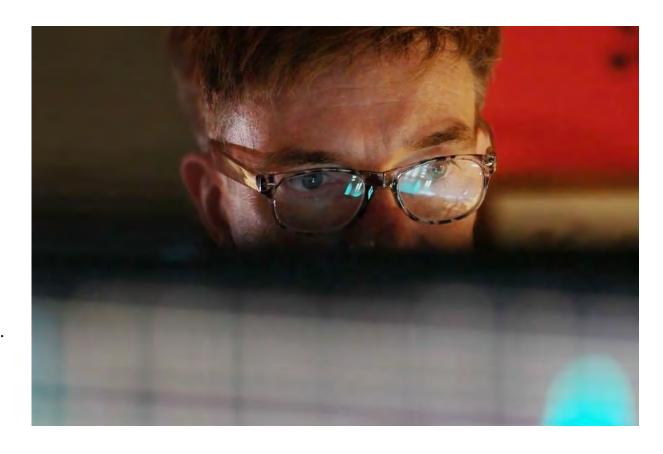
Even if you despise Bill Belichick and his gang of hotshot glory boys, you can still take notes from his playbook. Got any championship-level sales coaching tips of your own? Share them with us in our Sell to Win Facebook group! 🐝

PART 3:
Measuring Success

Six Sales Metrics That Managers Should Watch on a Daily Basis

As a sales manager, you know your team's strengths and weaknesses better than anyone.

That being said, an effective sales manager doesn't rely on intuition alone when deciding how to increase productivity. They analyze metrics over time in order to learn how to best support their team and fine-tune their sales process.

But which sales metrics should you watch, and what should you do with that information?

Ultimately, the numbers you focus on will depend upon your product, sales model, and customers' behaviors. By using a little bit of that "salesperson intuition" (plus some trial and error), you'll be able to determine which metrics are worth tracking for your team.

To get you started, we've compiled a list of six sales metrics that are essential for all sales managers to monitor on a regular basis, and four others that you may want to add to your dashboard depending on the length of your sales cycle and what you prioritize in your sales process. By tracking these particular metrics, you'll be able to identify the prospects that are most likely to convert, whether you need to improve a leaky pipeline, or if your offer itself needs adjusting.

1. Sales Productivity

Sales productivity is the total amount of revenue brought in divided by the number of sales employees. This is a great baseline metric to look at because it gives a concise overview of how well on average each member of the team is performing.

Compare this metric with that of a previous month, quarter, or year to identify any high-level trends. Further investigation into what's causing these trends can help you capitalize on or get rid of certain sales tactics.

You can also compare your sales productivity against how much you're investing in your employees. Take the sum cost of compensation, training, and support systems, then compare it to other ROI expectations across the rest of the business. This will help you understand if the investment makes sense compared to the amount of revenue that's coming in, or if it needs to be adjusted in some way.

Note: If you lead a high-volume sales team that closes multiple sales per day, it definitely makes sense to keep an eye on daily sales numbers. However, for businesses with low volume or long sales cycles, sales efficiency metrics or weekly/monthly revenue will be more relevant than daily sales numbers.

2. Lead Response Time

Reaching out to a lead immediately after they express interest in the brand increases the odds of making contact immensely.

A study by LeadResponseManagement.org found that **when a sales rep attempts contact within five minutes of a lead expressing interest, they're over five times more likely to connect.** That likelihood decreases significantly if the rep doesn't reach out until ten minutes later.

Monitor the lead response time of your reps at every stage of the pipeline. Responding promptly shows potential clients that your team is punctual and attentive, prevents competitors from swooping in first, and shortens your sales cycle by keeping leads moving quickly through your pipeline.

3. Quality of Lead Sources

Cutting down the time it takes to find and close new customers is key to increasing revenue. Not only that, it's good for team morale and keeps employees from feeling burnt out.

Filling your pipeline with highly qualified leads is the first step to quick sales. First, start by analyzing where your leads come from. With Nutshell's leads report, a sales manager can quickly discover how many leads each source is generating over a specific timeframe.

Compare this data with client wins to determine if there are any strong relationships between certain lead sources and the odds of acquiring a new customer. For example, you might discover that people who learn about your business via Google ads are more likely to become customers compared to people who discover you through your Facebook posts, in which case you may want to encourage reps to prioritize leads from Google.

Plus, you can let your marketing department know which of their strategies are working best so they can focus their efforts accordingly.

Related: How to unite your sales and marketing efforts with Nutshell's Unbounce integration

4. Upsell/Cross-Sell Rates

If your team isn't already upselling or cross-selling to existing customers, then they're missing out on low hanging fruit. There's a 60 to 70% likelihood that existing customers will respond to an upsell, while the likelihood of selling to a new prospect is only 5 to 20%. Not only that, but **if you're a B2B company, 90% of customer revenue likely occurs following the initial sale.**

Upselling and cross-selling provide a surefire way to increase sales productivity in a fraction of the time. It's crucial to know how often reps are selling to existing customers and if there's room for growth in this area.

5. Conversion Rates Through Your Pipeline

This is a big one. One of the most reliable ways to refine your sales process is to look at the conversion rates in every stage of your pipeline. You'll want to know how many leads advance through each stage and the average time spent in that stage:

Nutshell's Funnel report

After you identify leaky spots in the pipeline, you can work towards making improvements, whether that's refining initial contact policies, the content of follow-up emails, or how reps make the final pitch.

Scratching your head about what improvement strategies to use? This guide on effective lead management techniques can help optimize your pipeline.

6. Sales Forecast

Focusing too much on the short-term can leave a sales team in a very bad position. Any effective sales manager needs to look beyond the deals that are closing in the near future, and make sure that high quality leads are continuously entering the top of the funnel.

A sales forecast report tells you whether you have enough leads in your pipeline to make your next quota, based on the raw number of incoming new leads plus the following factors:

- **Deal size:** Either the potential revenue for each lead, or an average deal size based on similar leads.

- **Likelihood to close:** This could be based on your team's average win rate, or a measure of individual lead scores/lead confidence for each potential deal.

With this information, you can quickly discover how much revenue you're likely to take in based on the leads you currently have.

Nutshell uses lead confidence scores, which automatically adjust as the prospect advances through each stage of the pipeline. For example, if a prospect is potentially worth $27,600 in revenue and their lead confidence is 12%, they'll only add a projected $3,312 to your pipeline forecast. Another prospect worth $34,500 with a lead confidence of 83% would add a projected $28,635.

Keeping an eye on your sales forecast can help you guide your team on which leads they should invest more time into, and whether or not you need to focus more on lead generation.

Four More Sales Metrics That You Might Want to Keep Your Eye On

1. Frequency of Contact (i.e., Activity Volume)

There's only a one in fifty chance that a sale will be made during a first meeting. That means reps should be contacting new leads often, then following-up with existing prospects regularly.

The right CRM software makes checking in with your team easy. An Activity report quickly compares each team member's calls and field visits to previously established goals or expectations.

With this information, you could also analyze if there's a point at which too many calls or visits lead to a decrease in overall revenue. Finding the ideal number of contacts to make in a set time period can maximize sales productivity while reducing employee burnout.

2. Connect Rates Across Outreach Methods (i.e., Activity Outcomes)

Of course, quantity isn't the only marker of effective outreach. **A sales manager needs to be able to measure the quality of those touches as well, not just connect rates.**

Let's say you have a 40% connect rate with your emails, but only 2% of your email recipients convert into customers. Meanwhile, you connect with just 10% of prospects on the phone, but nearly all of them buy. Clearly, email is a less effective outreach method for you than phone, even if you're more likely to reach people that way.

The methods your reps use to approach potential clients could have a significant impact on your success. By collecting data on your connection rates from cold calling, cold emailing, and social media messaging, you can discover which methods to put more time and resources behind.

3. Email Open and Click Rates

If your team sends follow-up emails with white papers, resources, or other content that is

meant to attract prospects, it's helpful to keep a close eye on whether or not prospects open those emails and click through to the content.

High engagement with those emails is promising. It shows that prospects are interested in what they're seeing and that it's worth following up with them again, even if they're slow to respond.

Poor engagement, however, is a sign that you need to work with your reps on re-wording follow-up messages and what content to include. **Remember: Low open rates means your subject lines need work, and low click-rates mean the assets you're sharing aren't relevant enough to your recipients' needs.**

4. Lost Deals

Wondering why your team didn't win a contract? A losses report helps you keep track of the common attributes of lost or cancelled leads—from price to competition to territory to assignee—so you can identify trends over time and hone in on how to make your offer or sales process better.

Monitor Your Sales Process, Grow Your Business

A successful sales team doesn't run on natural talent and intuition alone. Growing a business sustainably requires close monitoring of sales metrics and the ability to address weak spots strategically.

The right data can immediately illuminate which leads are most worth pursuing, if your team's process needs tweaking, or if your offer needs adjusting in order to become more competitive.

Ready to get your sales data working for you? Nutshell's powerful reporting tools give you simple, fully customizable overviews of how well your team and pipeline are performing. Start a free 14-day trial today! 🐚

Eight Sales and Marketing Vanity Metrics to Avoid at All Costs

In sales and marketing, there are so many ways to pretend you're doing well.

All you have to do is find a couple of metrics that are increasing for your business—any metrics at all, really—and tell your boss, "The numbers are up!"

But here's the reality: In a B2B sales organization, anything you measure that doesn't directly relate to customer acquisition, customer retention, or revenue is a **vanity metric**, and vanity metrics are only there to make you look good.

Often, vanity metrics reflect the effort of your team, but they have virtually no connection to the impact of your team, or the overall health of your business. (And by the way, your boss knows this better than anyone, so you're not fooling anybody.)

To help keep you focused on the right things, here are eight metrics that you should stop wasting your time on, and nine you should start measuring instead, with a little help from your CRM reports.

Sales Vanity Metrics

1. Number of activities

One of the most common mistakes that sales teams make is focusing on the quantity of their interactions rather than the quality. An activity report is helpful for understanding your team's baseline volume of interactions, but without comparing it to other information like your sales numbers or the timelines of leads that

should have been won, **it's just a measure of busyness.**

"Activity metrics are only relevant when compared with opportunity creation," says **Colleen Francis**, president and owner of Engage Selling Solutions, and the author of *Nonstop Sales Boom*. "Measuring activities in isolation tends to make the seller with the most activities look the best, hardest working, and most successful, when this might not be the case. The best reps are the ones who do the least amount of activities to produce the highest number of opportunities."

Measure this instead: Quality of activities. Compare the activities logged by your best and worst-performing sales reps, and look for differences you can use to coach the reps who need help. Are they taking good notes? Are they spending time on the kinds of activities that lead to closed deals? Are they making tons of calls or having lots of meetings but not closing?

If not, you need to know what is actually happening during those calls and meetings. In your CRM, check out the timelines of some of their best won leads to see what they're doing that's bringing them real success. (Nutshell's

activity leaderboard and sales leaderboard can be very helpful with this, by the way.)

2. Conversion rate by activity type

Another thing we frequently see among Nutshell's own customers is sales teams trying to measure conversion rates from one activity type to another. For example, they'll track how many phone calls "converted" to in-person meetings. While that metric could be useful when testing changes to your phone script, it's generally irrelevant for two reasons:

- The goal of sales is to close deals, not book meetings.

- Call-to-meeting rate is often more influenced by lead quality than the skill of your sellers (i.e., low-quality leads mean less-qualified prospects, who are more likely to be disqualified during phone calls).

Measure this instead: Conversion rate by stage. By using your CRM's funnel report, you can identify which stage(s) your team is losing the most deals in, and make targeted improvements.

"When a sales rep can't close deals it's rarely

a case of not being able to 'close,'" Francis explains. "Usually there is a problem in the qualification or presentation stage of the pipeline. By knowing which stages they are below- and above-average in, you can zero in on the exact skills they need to improve, thereby increasing their performance."

"Conversion rates also drive lead generation requirements, which in turn drive marketing execution," Francis adds. "If you don't know how many leads you need to create the right number of opportunities and closes and by when, your funnel will never be accurate."

3. Total sales

Whether you're looking at revenue totals or number of closed deals, growing sales can make sales organizations feel warm and fuzzy, while masking potential inefficiencies. Obviously, sales totals are important to the health of your business, but they don't tell you how many deals were lost along the way or why those deals were lost.

Measure these instead: To get a full picture of your sales team's effectiveness, you need to keep your eye on two things...

- **Speed of qualified leads to close.** "Conversion speed is critical because once you know how quickly an opportunity moves through the pipeline, you can make time-management decisions about moving opportunities out of the pipeline that are delayed to the point of lost," Francis says. "Most sellers hang on to lost deals for double the amount of time it takes them to win a deal. If you are measuring the time each deal is in the pipeline you can cut ties with these

time-wasting lost deals sooner, freeing up time for each rep to spend with buyers that are actually interested in doing business with you."

- **Lost lead outcomes.** Your CRM's losses report can uncover the most common reasons for lost deals, and (gulp!) the total value of the deals you're leaving on the table.

Marketing Vanity Metrics

4. Total website visits

The size of your fishing net doesn't matter if the net is full of holes. Since website traffic doesn't directly correlate with marketing conversions, revenue, or even an effective strategy, the total number of monthly visitors or pageviews tells you very little by itself.

Plus, website traffic artificially rises and falls with the amount of money you're spending on online advertising. If your recent spike in traffic was bought and paid for in the form of keyword ads and display ads, it's not a win worth bragging about.

Measure this instead: Engagement metrics such as visitor frequency (how often a person visits your website) and **visitor recency** (the number of days since a person's last visit) can tell you whether or not your website is offering visitors something they're genuinely interested in—or if it's disappointing them when they get there.

5. New leads

Like website traffic, lead volume is something that can be artificially

spiked with an increase in advertising spending. It's also another metric that reflects potential more than results.

Marketing efforts should be focused on finding customers, not "leads." If your team is finding new and creative ways to stuff more garbage-caliber leads into the top of your funnel, they're focused on the wrong goals.

Measure this instead: Number of qualified leads. This is the number that should be steadily increasing if you hope to grow your business: How effective is your marketing team at attracting prospects that actually have a need for your product and the ability to buy?

If your lead volume is increasing but your sales aren't, it means you need to do a better job of explaining the benefits of your product within marketing and advertising messages, and then placing those messages in channels where potential customers can find them.

6+7. Social media audience size and impressions

Social media followers are a dime a dozen. (Actually, they're even cheaper than that if you buy them in bulk.)

True, having a large social media audience can suggest that your brand is regularly posting helpful, entertaining, and inspirational content to its social channels, but the intentions of your followers can be very diverse. Are they existing customers? Do they want to promote their own services? Do they want a job at your company? Are they doing some strategic stalking from a competitor's office?

Even less impactful than audience size is impressions, or the number of times your content was displayed (regardless of engagement). According to **Jacob Shwirtz**, Global Head of Social Media Strategy at WeWork, keeping track of impressions isn't worth your time. "Multiplying anything by the number of followers you have, or by an assumption of your average follower size, just doesn't mean anything since we know that a tiny percentage of anyone's following actually sees or cares about any given post," Shwirtz says.

Measure these instead:

- **Content shares.** Social shares tell you that you've honed in on what resonates with your target personas, and that you're consistently serving them content that

they get excited about. "A share is a real vote of confidence, where someone took the time—and their personal credibility—to share that piece of content with their friends and followers," Shwirtz says.

- **Number of conversions generated by social media.** The number of clicks generated by social media posts can be a vanity metric, if those clicks aren't taking visitors to any page where they could realistically convert into customers. Make sure that at least some of your social posts direct to website pages where visitors can complete a form to download a content offer or request more information. By fine-tuning the frequency and messaging of your social content, you can increase the number of people who land on your pages and convert into leads.

8. Newsletter subscribers

Email newsletters are often mis-measured—with subscriber growth being given more attention than growth of the resulting leads or revenue—and like social media accounts, companies often launch them without a coherent strategy, assuming that results will naturally follow.

The big mistake to avoid with newsletters is **never asking for the sale**. Sure, newsletters are important for customer nurturing and prospect education, but the end goal is to produce revenue through new or repeat business.

Measure this instead: New leads generated each month from your newsletter. If people are subscribing to your email newsletter because they're interested in your company, you want to make sure that you're actually using those newsletters to guide subscribers to a buying path. Keep in mind, effective newsletters don't constantly try to sell—but when they do, they make the ask clearly and directly.

Increasing the number of your newsletter readers who go on to engage with a member of your sales staff or otherwise express interest in your products can be done in two ways: 1) Making sure there are purchase CTAs both within the newsletter itself, and on any website page the newsletter links to, and 2) increasing the frequency of the newsletter. As long as you're consistently offering value to the reader, there's no reason your monthly newsletter can't be increased to a weekly or even daily cadence.

Did we leave out your most despised vanity metric in sales and marketing? Tweet it to us at @nutshell! 🐿

Nutshell
16 Sales Process Templates for B2B Pipelines

16 Sales Process Templates for B2B Pipelines

Whether you're building your first pipeline from scratch or want to overhaul an existing process, these templates will give you a great head-start.

TAKE ME THERE

PART 4:
Career Advancement

Expert Advice: What Business Leaders Really Look for When Hiring a Sales Manager

Whether you're a veteran sales rep looking for your first leadership role, or a sales manager in search of a bigger opportunity, being able to sell yourself effectively is a necessary skill.

How do you stand out from other sales professionals with similar experience? What's the secret sauce that's going to convince a C-level executive or hiring manager to take a chance on you?

If you're a business leader looking to fill a sales manager position, you may also have concerns about how to evaluate candidates so you can find the right person to lead your company's sales team.

Nutshell asked three experts to share their advice on how to hire a sales manager, and what prospective candidates should know before they walk into a sales manager interview.

What Makes a Sales Manager Worth Hiring?

"When you hire a sales manager, **identify what you want in a leader first**, then structure your questions to identify if the person has those qualities," says **David Hoffeld**, CEO and Chief Sales Trainer of Hoffeld Group.

"What are the position essentials? How much experience is required? If it's technical sales, how much technical experience are you seeking? If coaching is big a part of the role and a candidate doesn't have coaching experience, ask yourself, 'Do I have time to help develop this person as a coach?'"

"From my research, **someone likely to be a top performing sales leader has a growth mindset.** They believe sales abilities are like a muscle you can continually strengthen, and not a fixed mindset where you are either born or not born as a salesperson," Hoffeld told Nutshell.

"For assessing whether someone has a growth mindset, you can determine whether they demonstrate that quality by asking questions like, 'Share with me how you helped others in the past get better at selling.' Or, if they are currently a rep you can ask them, 'How have you improved yourself? What books or training have you done that the company didn't require?' **If they can't show it, they don't have it,"** Hoffeld says.

Preparing for a Sales Manager Interview as a Candidate

"If I'm the candidate, I'd want to **research the organization and what success looks like in the position,"** says Hoffeld. "What will enable you to be a top performer there?"

Hiring managers often will ask you to recall specific times that you handled a situation or conquered a challenge. (For example, "Tell me about a time where you demonstrated capability above and beyond your current role.") Write down specific scenarios and stories to help you prep for your interview.

"Coaching is a big part of sales managing, so think about how you helped or gave colleagues advice," Hoffeld says. **"And don't just say, 'I have a passion for coaching.'** Be very specific about how you have demonstrated those qualities."

You'll also want to show how you would evaluate and develop sales reps as a manager. Some of the questions you could be asked are:

- How do you determine where reps are strong and weak?

- How do you develop an individual development plan and how much time per week do you invest in it?

- How do you incentivize your reps' performance?

According to **Steve Benson**, CEO of Badger Maps, team building and being able to hire the right sales associates are critical skills for managers, and you should be prepared to discuss your recruitment approach.

"If I hire you here and I need three new sales reps the Monday after getting funding, how would you go about sourcing those reps?" Bensen says. "Who would you bring on? The right answer is, **'Here's how I would find real people who are fantastic.'** The wrong answer is, 'I would bring on a sales recruiter'."

Something you have less control over are the inherent biases from individual hiring managers. For example, some Fortune 500 companies prefer candidates with prior experience working for a company of similar scale. Benson said one of his former co-workers stated they would never hire another employee from a particular company because he had terrible experiences with every previous hire from there.

"A lot goes down to gut choices to a certain degree," Benson says. "But ultimately, **you want to hire people who you'd want to buy from."**

The Importance of Being a Player-Coach

"Companies often look for great salespeople when hiring managers, and unfortunately that doesn't work," says acclaimed sales speaker Barrett Riddleberger. "They really need someone who is a coach—not a behind-the-desk manager, but someone who's on the field, watching and course-correcting.

"A coaching philosophy has to be embedded into the DNA of the manager, and a lot of sales reps just don't have it," explains Riddleberger.

"When I look for managers, I want someone who understands the sales process and can look at individual reps and see what they need to work on most," says Bensen. **"If you don't have a player-coach, you will get a manager with a spreadsheet** who just wants the numbers to be higher, with the implication that the manager will start firing people if they're not."

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How to Take Over for Another Sales Manager: 8 Ways to Ensure a Smooth Transition

If you're reading this, congratulations! You've probably just landed a new sales leadership role, and you want to make the transition as successful as possible.

While this is an exciting time for you, it's also a time of change for your sales reps. Adjusting to a new sales manager can be difficult, especially if the last person in charge was well-liked by the team.

If you've been promoted to a manager position from within your organization, you might even encounter some jealousy or hostility from your former peers on the sales floor.

Whether you've been promoted to sales manager in your current company or you're joining a new company in a leadership position, you'll have to find a way to **gain the team's trust, get up to speed with what the role requires, and achieve the goals that have been set out for you by your company's executive team.**

Follow these eight guidelines for replacing a previous sales manager, and you'll have a much easier time filling the last person's shoes.

1. Understand what you were hired to accomplish

Before you start driving your team to create new business, make sure you have a full understanding of the expectations that come with your sales manager role, and why your company needed you to take over in the first place.

"The number one thing a sales manager should keep in mind is why they were hired," says

Sales Evolution CEO and veteran sales coach **Scott Messer**. "Were you hired to replace an underperforming sales manager or a high-performer who left the company for another opportunity? What does your manager expect from you? Is the goal to transition from less qualified sales reps and hire more experienced sales reps who can work bigger and longer deals?"

Having regular check-ins with your own manager early on will help you get a clearer sense of what you were hired to achieve in your new position. It will also help you stay on track with your own goals for your sales team. Never be afraid to ask for a meeting with your own manager if you are unsure whether the changes you plan on making make sense for the company.

2. Find out how your team felt about the previous leadership

One thing that will help make the transition process easier for your team is to be as candid about it as possible. Since you're taking over for someone else, ask the team what they liked about their previous manager's leadership style and what you could do differently as their new manager.

Ask each member of the sales team, **"If you were the sales manager, what changes would you make?"** Not only will this get your team thinking about your presence in terms of positive improvement, but it will also help them to consider what changes the entire team can make to become more successful.

Additionally, discuss what works and what doesn't work in the team's current sales process and let them know that you are there to help them in any way possible. Be there to listen, and hold off on trying to improve their process right away.

3. Speak to everyone individually

It can be difficult to lead an entirely new team when you're still trying to memorize everyone's name and position. But no matter how big your sales team is, you should do your best to get to know each and every person on it. Find out what they believe their strengths and weaknesses are, their personal and professional goals, and how they work best.

One-on-ones are especially important if you've been promoted to sales manager within the same company. **If you are now the manager of**

someone who used to be your peer, it's important to clear the air early and have a conversation about it. Adjusting to a new work dynamic will be easier if you acknowledge the change.

According to **Ira Wolfe**, President of Aim Smart Coaching, it's imperative for new managers to build relationships with their team members in order to gain an understanding of how they think. **"Just as salespeople ask questions to learn about their prospects' needs and how they can serve them, the same should be done by the manager with their salespeople,"** Wolfe says. "Build rapport, understand their values and challenges, and learn how you can support them."

4. Establish concrete goals and expectations—for yourself and for the team

What do you want to achieve in your first quarter as the team's new manager? What do you consider to be your priorities in order of importance? Make a list for yourself, then share your goals with the team, letting them know that they can hold you accountable, too.

You should also have ongoing conversations with the sales team about what you expect from them, including goals you have for the team as a whole and for each individual member. **No member of your team should feel confused about what the measures of success will be under your leadership.**

Of course, goal-setting shouldn't just be a top-down exercise. Encourage your sales reps to come up with their own individual goals—even for

what they'd like to see from the rest of the team and out of you as a leader—and share those goals with you as they feel comfortable.

5. Make sure everyone stays motivated during the transition

If you're feeling nervous about taking on a new role and leading a new team, chances are your new team feels just as uneasy about answering to a new manager.

One way you can reduce their anxiety is by being there for them. Ask them what you can do to help them during the transition and beyond. Know that every individual has a different working style, and every person on the team may need different things from you. Some may work more independently while others may like to collaborate. Figure out what motivates each person individually and do your best to support it.

Sometimes, a lack of motivation can stem from a misunderstanding of why our roles in sales are meaningful, so **make sure the team knows why their work is important.** Have a conversation about why each person on the team matters to the success of the team and company as a whole, and reiterate why their work is meaningful.

6. Don't assume that what worked for your last team will work with this one

If you have previous leadership and management experience, you likely have your own philosophy and techniques for managing a team. But not

all tactics work in all organizations, and you can't expect everything to improve the moment you start in your new position.

Of course, you should use your prior experiences to help you succeed in your new role and to help your team succeed under your leadership. That being said, changing everything right away can create unnecessary conflict. Every team is different and responds to different leadership styles and processes, so keep that in mind when you enter your new position.

7. Build team unity

Whether you're getting to know a new team or moving up in your company, building team unity is a must. **A unified team is a successful team,** so it's important that you and your sellers feel comfortable with each other.

Schedule activities outside the office so you and the team can get to know one another. Have team lunches once a week, participate in volunteer work together, or go out for a well-deserved happy hour after closing a major account. The better you know each other, the more effectively you'll be able to work together.

8. Don't sweat the small stuff

This may seem like a no-brainer, but trust us. Your new position might not be as easy to transition to as you hope. As with any new role, it will come with its fair share of hard times, but keep your head held high and do the best you can.

Whatever the reason, you were hired to bring value to the sales team, so keep that in mind when settling in to your new role. Remember to breathe, give gratitude for your opportunity, and **don't let losses keep you from celebrating your wins, big or small.**

What are some of the strategies that you've used to get off on the right foot in a new sales manager role? Tweet them to us @nutshell or start a conversation in our Facebook group! 🔥

Admit it. You're curious.

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