



Marks & Associates

Sales Management Seminar - Course Overview

Controlling The Process

A great salesperson and a great sales manager require nearly opposite skills -- a fact that is pretty much overlooked by most banks who dutifully promote their best salespeople to sales managers. While sales management skills can be learned, too few banks take the time to teach their new sales managers what it is they are supposed to do. Coaching, counseling, motivation, control, training of staff, conflict reduction, interviewing, listening skills and much more are critical to the creation of a good sales manager. The sales manager must be able to lead his or her team and form reasonable behavior standards and a solid support structure.

Marks & Associates' Sales Management Seminar is a two-day course designed to teach new and existing sales managers the skills they need to succeed. Beginning with an assessment of the differences between sales people and sales managers, it reviews the management of resources, setting of priorities, navigating within the bank's organizational culture, and the major issues in the bank's efforts to sell more product.

At the conclusion of this class, participants will:

- Understand the difference between strategic planning and market planning
- Know how to create performance standards for the sales staff and for the sales manager
- Know how to hold and evaluate effective sales meetings
- Understand how to debrief salespeople after a call.
- Be able to use effective coaching and counseling techniques
- Be able to conduct efficient and effective job interviews
- Recognize important information
- Know the components of a good call report
- Implement an effective follow-up system

The participants will use classroom exercises, role-playing and case studies to learn and master the skills and techniques taught. Sales management requires a very different questioning technique than the one used for sales. As a result, many sales managers who may be very good at selling, find themselves at a real loss when required to work with their sales team.

Cheerleading, pleading, cajoling, guilt, anger, frustration, rage, pandering and manipulation do not work in sales management. The techniques used for successful management are totally different and not intuitive. The class is targeted at teaching managers how to plan, manage, interact with their charges and better form a working team. This is particularly important if the bank is in the process of establishing new teams as the result of a merger, acquisition or entry into new markets.

This is not a selling class. The attendees should be focused on how to manage, or develop a sales force within their bank. A brief outline of the class follows:

Sales Management Seminar - Course Overview Continued...

I. What is sales management

- A. Components
- B. Goals
- C. Attributes

II. *Measuring Sales Manager Performance*

III. *Major Obstacles to Good Sales Management*

IV. *Working Within Resource Allocations*

- A. Why we feel we cannot afford two or three days to train our staff.
- B. Budget impacts.

V. *Priorities*

- A. Establishing
- B. Changing
- C. Communicating to the Salespeople
- D. Anticipating Impact of Performance Standards

VI. *Setting the Sales Culture*

- A. Establishing and Using Formal and Informal Leaders
- B. Changing the Culture
- C. Establishing Performance Standards
 - 1. Effort vs. Results
 - 2. Behavior Reinforcement
- D. Sales Meetings
 - 1. Reporting vs. Support
 - 2. Scheduling & Agenda
 - 3. Sales Debriefings
- E. Information Gathering: Sources and Timing
- F. Sales Follow-up: Call Reports & Automating System
- G. Joint Calling: When Not To Do

VIII. *Hiring and Firing*

- A. Expectations vs. Realities
- B. Avoiding the Traps
- C. What to Look For in a Good Candidate
 - 1. Fit With Organizational Culture
 - 2. Experience - Job Skills, Education, Training
 - 3. Talent - Behaviors Needed to Get the Job Done.
- D. Improving the Interview Process

Sales Management Seminar - Course Overview
Continued...

IX. Motivation and Problem Avoidance

- A. Conflict Resolution: Methods, Patterns, Rules
- B. Listening Skills
- C. Crisis Preparation: Providing Rehearsed Responses for Mergers, Performance Changes, Loss of Personnel, Other Organizational Issues

X. Coaching and Counseling

- A. Learning how to handle different types of personalities and motivations.
- B. Discovering through role-play how to effectively get the most out of your sales staff.
- C. Extensive case work is used to pose real life sales management problems for the managers to resolve.
- D. Roadblocks to success
- E. How to give feedback to employees
- F. Problem solving in management
- G. Who owns the problem
 - 1. Active Listening
 - 2. Roadblocks in problem resolution
- H. Building trust
- I. Reducing defensiveness
- J. Coaching behaviors not attitudes
- K. Effective coaching checklist is given to the participants for their use in actual management situations
- L. Active listening checklist
- M. Call coaching sheet

These checklists are designed to help the manager conduct role-playing sessions with their employees. Although most managers admit that role-playing is very effective in improving the skills of their staff, they shy away from it because they do not know how to conduct the sessions. These checklists lay out the format for the role-play as well as giving a format for giving good feedback to the salesperson. All the forms are explained in detail.