FAST START TRAINING PROGRAMME FOR NEW SALES: SALES MANAGEMENT

Managing Your Sales Process

Purpose:

- Everyone uses the same process
- Managing all your Sales Efforts in a Simple Way
- Analyse your own performance & look for ways to improve

What/How?

1. Leads/New Contacts Sheet/Form - Daily
2. Call Back/Follow Up Sheet/Form - Daily
3. Event Emails Out Report - Daily
4. New Contacts Update Web Form – Daily
5. Office Sales KPI Update - Daily
6. Personal Sales Tracking – Weekly

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1. Leads/New Contacts Sheet/Form - Personal

LEADS SHEET

Date	Company Name	Name / Job Title	Contact Details (GL/DID/Mobile)	Email Address	Notes

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2. Call Back/Follow Up Sheet/Form - Personal

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CALL BACK SHEET

DATE:

EVENT:

SALES EXEC.:

Country:

CONTACT DETAILS:

Company Name:

Contact Name:

Job Title:

General Line: FAX:

Direct Line: MOBILE:

Email Address:

Qualifying (must circle)			
Relevancy	YES	NO	
Authority	YES	NO	
Date	YES	NO	
Budget	YES	NO	
Rate Your Pitch	STRONG	AVERAGE	POOR

Reports to:

Specific issues concerned:

Referrals:

URGENCY *(Discounts/seats/others)*

CALL BACK

Date & Time	Remarks

What are other training topics or areas you are planning to participate or a priority in next 6 months?

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3. Event Emails Out Report - Team

EVENTS EMAILS OUT

EVENT NAME: ______________________________

LETTER __________

SALES PRO	COMPANY	CONTACT NAME & JOB TITLE	WORKSHOP TO ATTEND	DATE EMAILED	Expected Date to BOOK

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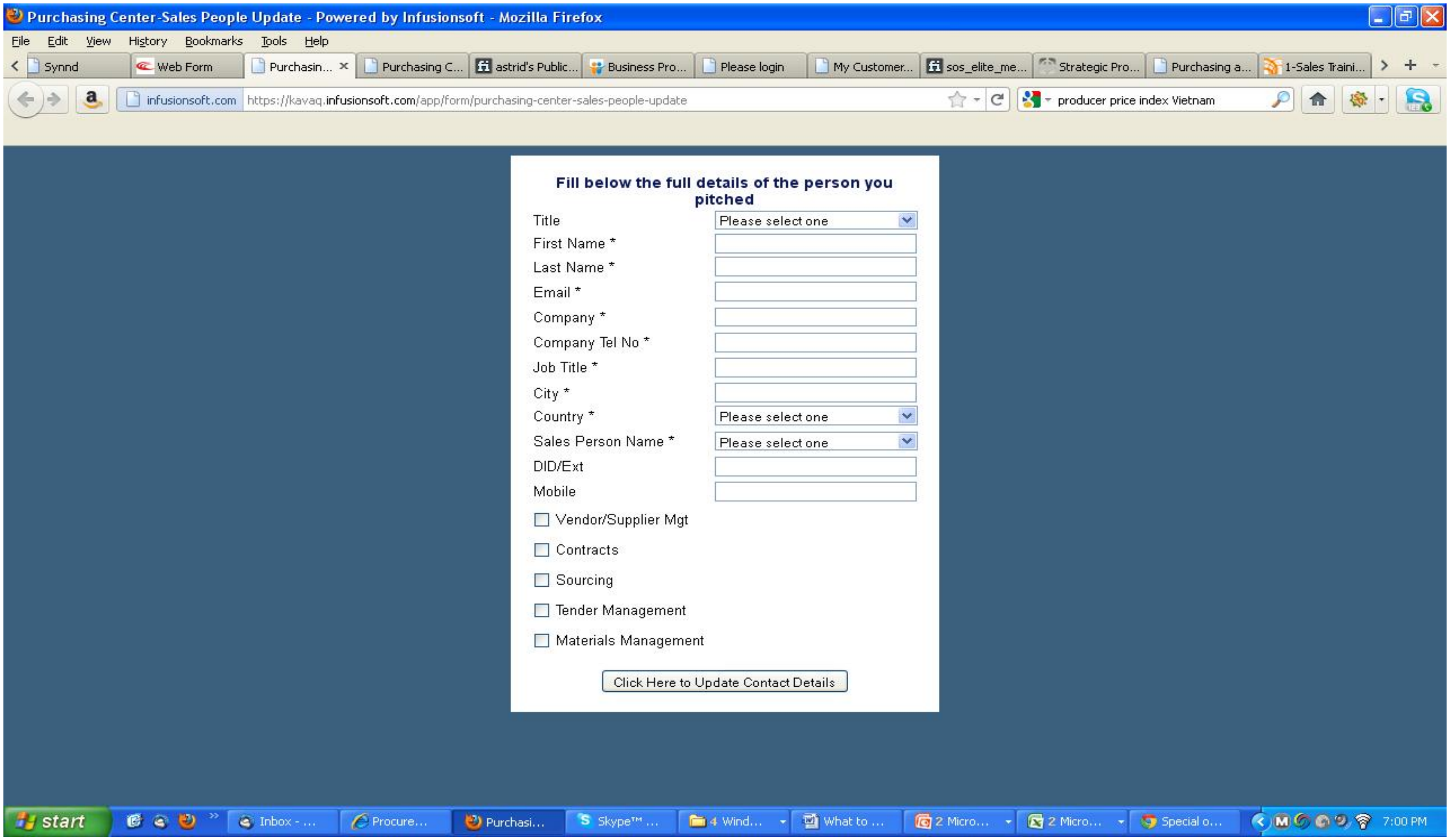
4. New Contacts Update Web Form



https://kavaq.infusionsoft.com/app/form/purchasing-center-sales-people-update

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5. Office Sales KPI Update - Daily

Office Sales KPI Updates

WEEK: 28 Nov - 2 Dec 2011

SALES PRO	PITCH					TOTAL	EMAIL / FAXES OUT					TOTAL	CALL BACK					TOTAL	DEALS IN	AMOUNT	REMARKS
	28 MON	29 TUE	30 WED	1 THU	2 FRI		28 MON	29 TUE	30 WED	1 THU	2 FRI		28 MON	29 TUE	30 WED	1 THU	2 FRI				
TOTAL																					

Managing Your Sales Process

6.1. Personal Sales Tracking – Sales/Event Weekly Report

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Sales Weekly cum Event Report

IMPORTANT: Pass a copy of this Report to your Supervisor at the end of each Week.

Your Name: Event Name & Date:

Week	Pitches	Emails	Del. No	Value
1				
2				
3				
4				
5				
6				
7				
8				
9				
Total	0	0	0	0

DEALS IN DETAILS				
Date	Company	Del No.	Total Value	Remarks
Total		0	0	

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6.2. Personal Sales Tracking: Cheques/Collection Status Report

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Cheques/collections Status

IMPORTANT: Pass a copy of this Report to your Supervisor at the end of each Week.

Your Name:

Highlight in yellow all the revenuews/deals that are paid

No	Sales Person	Event Name	Dates	Company	Full Amount	Del. No.	Invoice Date	Date Expected	Date In	Last Update	Remarks
1	SAMPLE	Cost Reduction	16 & 17 Jan 2012	NEC	13,450	3	1-Oct	10-Oct	15-Oct	15-Oct	Payment is being prepared and will be in by 15 October 2011. Payment came in on 15 Oct 2011
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
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31											
32											
33											
34											
35											
		Total			13,450	3					

Managing Your Sales Process

6.3. Personal Sales Tracking: Event Tracking Ratios Sheet

Personal Event Tracking Sheet IMPORTANT: Pass a copy of this Report to your Supervisor at the end of each Event

Your Name:

Event Name	SAMPLE												TOTAL
Dates & Place	11 - 12 Oct 2011												
Faxes	520												520
(Prospect/potential Customers)													
Conversion Rate %													
Number of deals divided by number of faxes	2.1%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	2.1%
Number of delegates divided by number of emails sent out	3.7%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	3.7%
How many faxes you sent to get a deal	47	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	47
How many faxes you sent to get a delegate	27	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	27
How much did you earn for each email/fax sent out	17	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	17
=													
Companies/Deals	11												11
Number of Transactions	1.7	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	1.7
(the average number of delegates each company sent for the event)													
Number of delegates	19												19
Average Dollar Sale	4,731	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	**4,731**
(the average price of the items you sell per client)													
Total Turnover	89,897												89,897

Managing Your Sales Process

Putting it all together?

1. Get your leads written in Leads Sheet ready for pitching
2. You pitch and email by filling in the Call Back Sheet – ready to call back with all remarks of what happened.
3. You Update the Event Emails Out Report.
4. Update the WebForm with Full Contact Details
5. Use the Call Back Timing Sheet to write down the time for important call backs.
6. At the end of the day Update the office Sales KPI Report with Pitches, Emails Out and Deals In.
7. End of the week update your Personal Sales Tracking Report:

   - Personal Weekly Event Report

   - Weekly Cheque Status

8. End of the Event Update your Personal Event Tracking Sheet Ratios

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QUESTIONS?