Sales Tip #6: Improve Sales Effectiveness with a Team Selling Approach

Goal: Collaborate with others and work effectively as a team to improve sales effectiveness.

Message to Sales Managers:
Everyone likes to be in charge. In a team selling environment, this is a challenge. By defining roles and establishing some simple rules of engagement, everyone can “be in charge” of their own areas of responsibility, and you can still manage an effective sales process – even at the meeting level.

Best Practice:
Defining roles and responsibilities of Sales Team members is the key to working well together. The most critical component of the team selling approach is meeting management. This is because your interactions with each other are visible to the prospect during the meeting. The impression you leave the prospect with can either create a positive competitive advantage for you, or create concern about your ability to work together as a team to help them solve their problems.

Here are some steps that we recommend you follow in order to properly execute a successful sales meeting in a team-selling environment:

1. Define meeting goals and objectives
    a. What do you hope to accomplish?
    b. Goals should contribute to moving forward to the next stage in the sales process
    c. What actions / information are needed to move to the next stage of the sales process?
    d. Who needs to attend (on both sides) in order to accomplish your meeting goal(s)?
2. Create and communicate a meeting agenda (in advance of the meeting)
    a. Confirm agenda meeting goals
    b. Confirm list of attendees (will the required attendees be present in order to accomplish you meeting goals?)
    c. See sample meeting request message provided below in the Tips and Tools section
3. Hold a pre-call planning meeting
    a. Can be as brief as 15 minutes
    b. Define sales team roles and responsibilities
    c. Role-matching: Map your team member roles to the roles of the prospect attendees. The idea here is to create peer-to-peer relationships between your sales team, and the prospect’s decision-making team.
    d. Review agenda and rules of engagement. Who will take the lead on each topic?
4. Debrief after the call
    a. How did we perform as a team?
    b. What did we do well?
    c. What can we do better or differently next time?

Tips and Tools: Here are some tips and tools that you can use for a successful team-selling effort:

1. Use a worksheet to define the roles and responsibilities of your team members. Here's an example a simple tool that you can implement to help with role-matching and in defining meeting rules of engagement:

Sales Team Role	Client Role	Topics, Areas of Coverage	Internal Team Member(s)
Account Manager (Who owns the overall customer relationship?)	Executive Sponsor (Who chartered the creation of the decision-making committee?)	C-Level Relationship Management	
Opportunity Owner (Who is forecasting the deal?)	Team Leader or Committee Chairperson (Who is leading the evaluation process?)	Opportunity Management – Identify/Qualify/Close, proposal assembly and review	
Sales / Technical / Application Engineer	Technical Evaluator (IT or Engineering contact, for example)	Interface with technical contacts, prepare custom demonstrations, design the technical solution	
Project Manager (Who will lead the implementation effort?)	Project Manager (Who will the primary contact be on the client side after the sale is made?)	Project Management, Implementation Milestones, Training	

2. Stay in your own lane. Address issues that you are responsible for covering based upon your role.
3. Stay focused and on point.
4. Don't oversell or over-respond. Keep your responses brief. If the prospect wants to hear more, they'll ask.
5. Never contradict a team member. If necessary, call for a break to discuss a sensitive issue.
6. Ask – don't tell. Generally speaking, it's better to listen than to talk.
7. Show basic professional courtesy.
    a. Don't interrupt
    b. Manage time well. Be on time, and don't run late (without permission)
    c. Stay focused on the meeting. No cell phones, emailing, or texting!
8. Develop a debriefing tool. Here is an example that you can modify for your own use:

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Sales Call Debriefing Worksheet

	Worst 1	2	3	4	Best 5	Notes What did we do well? What could we have done better?
Meeting Management						
Reviewed meeitng goals						
Reviewed agenda						
Maintained focus (managed agenda)						
Managed roles and responsibilities						
Ended on time						
Sales Skills						
Reviewed business needs & pain						
Established rapport						
Successfully handled objections						
Defined Decision Making Process						
Defined Decision Criteria						
Gained Access to Decision Maker						
Closing						
Miscellaneous						
Prepared properly						
Scheduled next meeting						
Managed Partner Involvement						
Effective proposal review						
Outcome						
Achieved meeting goals						

How Salesforce.com can help:

1. Use Sales Team and Contact Role features on the Opportunity Record
   - Sales Team: Internal team members
   - Contact Roles: People outside of your Sales Team involved in or impacting the decision-making process
   - Benefits:
     - Formalizes role definitions – everyone is on the same page
     - Assists in planning
     - Automated communications – workflow rules can be established to automatically update Sales Team members of opportunity updates and changes
2. Build email templates for your meeting requests with draft agendas. Here is an example:

> Dear {!Contact.FirstName},
>
> Based upon our conversations to date, I have prepared a draft proposal that is ready for your review. As I prepared the proposal, it became clear that we have several options to consider that may impact the pricing, terms and timing of the project. So I'd like to schedule a meeting to review the draft proposal with you in person with the following agenda:
>
> - Review of project goals and objectives
> - Discussion and modification of Draft Proposal
> - Review final scope, pricing, terms and timing
> - Define next steps and action items
> - Adjourn
>
> The purpose of the meeting is for us to work together real-time to modify the draft proposal so that by the end of the discussion, we agree upon a scope of work and pricing model that exactly meets your needs and expectations.
>
> My goal is to be in a position after the meeting to deliver a final proposal that you are 100% comfortable moving forward with.
>
> Here are some dates and times that would work at my end:
>
> - Option 1
> - Option 2
> - Option 3
>
> {!Contact.FirstName}, if none of these options work for you, please feel free to suggest a couple of alternatives.
>
> I'm looking forward to working with you and the rest of the {!Account.Name} team!
>
> Best regards,
>
> {!User.FirstName} {!User.LastName}
> {!User.Title}
> {!User.CompanyName}

   - Benefits
     - Fast and easy to communicate
     - Supports communication standards and quality
     - You can tell when the agenda email has been opened

Having an Account Plan and proactively managing the relationships with your most important customer will pay huge dividends over time, and enhance your personal relationships at an executive level.

If you would like to see a sample Account Planning template, please log onto the Resources section of the HarvestGold web site – and help yourself!

Good Selling everyone!

Steve