

# **Sales Team Hiring and Managing Best Practices**



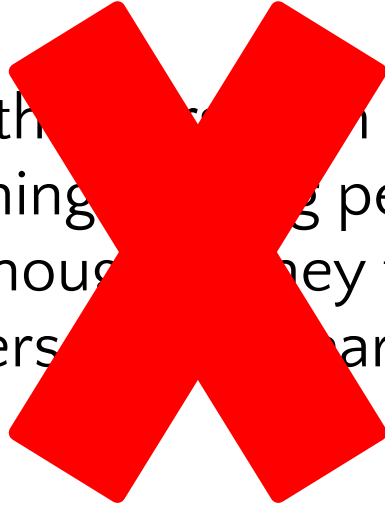
## When to hire?

- When you have too many leads to handle
- When the time it would take you to work and close the number of leads to meet your sales goal is greater than the amount of time you have available
- When you find yourself dropping the ball on deals you are working due to time constraints



## When to hire?

When the business is growing and  
everything is going perfectly and I  
have enough money to pay a new  
salesperson's 6-month salary cash





## How to hire?

- Put the word out to your network
- Post Job Ad on main hiring sites:
  - LinkedIn
  - Monster
  - Craigslist?
  - ZipRecruiter
- Run the applicants through your hiring funnel



# Hiring Funnel

1. Questionnaire



## Hiring Funnel

- What is your name?
- What's your email address?
- What is your phone number?
- Where do you live?
- How did you find us?
- What's your experience been with our business?
- Why are you leaving your previous job?
- Why do you want "this" job?
- Tell us about your experience in sales. What training, resources, teachers, and experience has shaped your knowledge?
- Provide an example of over achievement that you are most proud of. This is not limited to professional achievement because over achievers do so in all areas of life.
- Our growth has us also looking for future leadership. Have you had any Sales Management experience. Please note your honest reply will NOT impact our decision in a negative way. We are looking for sales reps now, we just so happen to be looking for our next VP of Sales as well.
- Turn back now if you are afraid of the phone. Share what makes you great at closing sales over the phone. We are a virtual company 1st and foremost and the majority of all new clients are acquired virtually.
- Is there anything else that you want to tell us?



## Hiring Funnel

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1. Questionnaire 1
2. Video describing sales job in more detail
3. Questionnaire 2



## Hiring Funnel

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- ⦿ What is your name?
- ⦿ What's your email address?
- ⦿ What is your phone number?
- ⦿ Where do you live?
- ⦿ After seeing the video do you still want the job?
- ⦿ What is the soonest you can start?
- ⦿ The job is full commission, are you still interested?





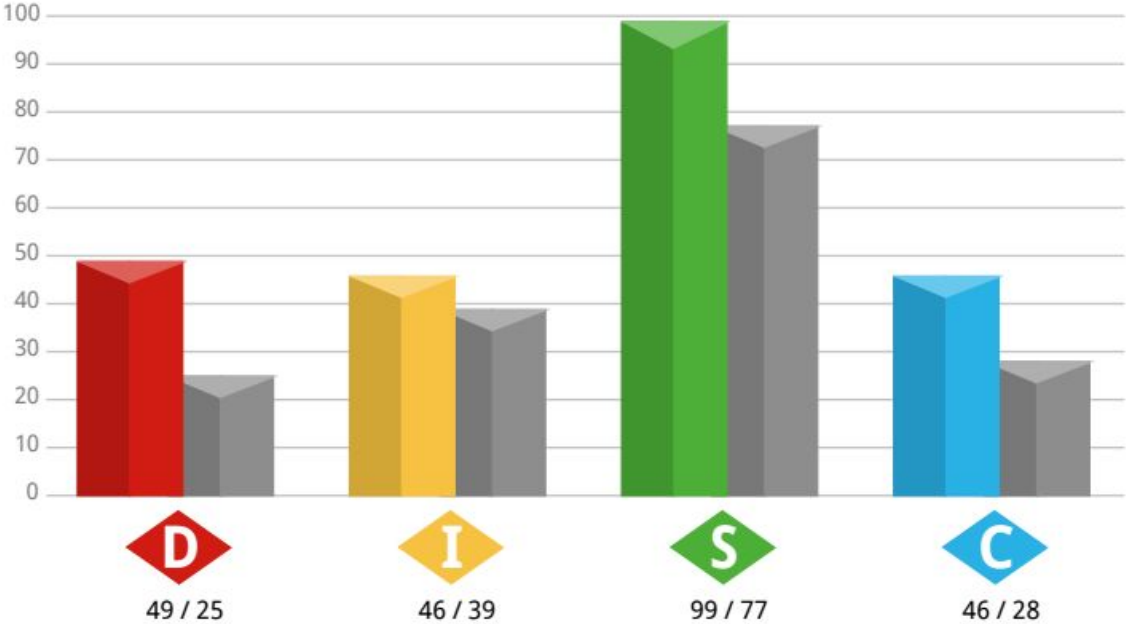
## Hiring Funnel

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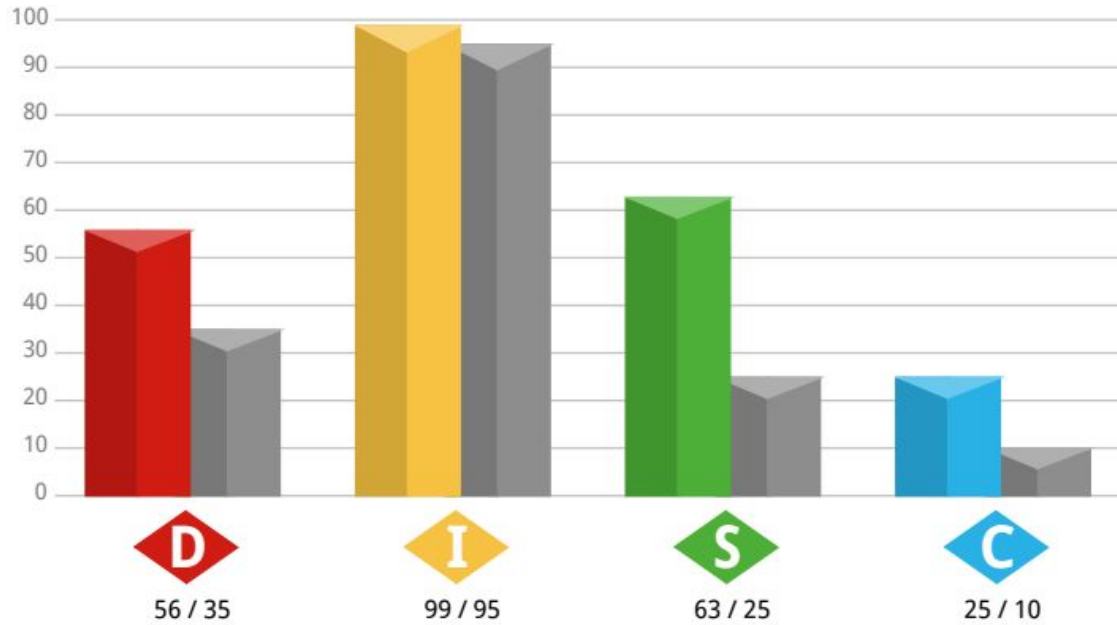
1. Questionnaire 1
2. Video describing sales job in more detail
3. Questionnaire 2
4. 15 minute assessment
5. Disc Assessment

Decisive	Interactive	Stabilizing	Cautious
<b>Problems:</b> How you tend to approach problems and make decisions	<b>People:</b> How you tend to interact with others and share opinions	<b>Pace:</b> How you tend to pace things in your environment	<b>Procedures:</b> Your preference for established protocol/ standards
<b>High D</b>	<b>High I</b>	<b>High S</b>	<b>High C</b>
<b>Demanding</b> Driving Forceful Daring Determined Competitive Responsible Inquisitive Conservative Mild Agreeable <b>Unobtrusive</b>	<b>Gregarious</b> Persuasive Inspiring Enthusiastic Sociable Poised Charming Convincing Reflective Matter-of-fact Withdrawn <b>Aloof</b>	<b>Patient</b> Predictable Passive Complacent Stable Consistent Steady Outgoing Restless Active Spontaneous <b>Impetuous</b>	<b>Cautious</b> Perfectionist Systematic Careful Analytical Orderly Neat Balanced Independent Rebellious Careless <b>Defiant</b>
<b>Low D</b>	<b>Low I</b>	<b>Low S</b>	<b>Low C</b>

# Natural and Adaptive Styles Comparison



## Natural and Adaptive Styles Comparison



## Natural and Adaptive Styles Comparison





## Hiring Funnel

1. Questionnaire 1
2. Video describing sales job in more detail
3. Questionnaire 2
4. 15 minute assessment
5. Disc Assessment
6. Fill out NDA and other paperwork
7. Send in a recording of reading your script
8. Final Interview



## Management Schedule - REP

- ⦿ Monday
- ⦿ Tuesday
- ⦿ Wednesday
- ⦿ Thursday
- ⦿ Friday



## Management Schedule - REP

- Monday - Sales Training/Meeting
  - Review sales numbers
  - KPI's
  - Sales Training
- Tuesday
- Wednesday
- Thursday
- Friday





## Management Schedule - REP

- Monday - Sales Training/Meeting
- Tuesday - Got a minute meeting
  - Hold open floor meeting to ask questions
  - You could review sales ops/CRM etc etc
- Wednesday
- Thursday
- Friday



## Management Schedule - REP

- Monday - Sales Training/Meeting
- Tuesday - Got a minute meeting
- Wednesday - Hot Seat
  - Listen to one phone call in a group setting
  - Everyone participates analyzing it
- Thursday
- Friday



## Management Schedule - REP

- Monday - Sales Training/Meeting
- Tuesday - Got a minute meeting
- Wednesday - Hot Seat
- Thursday - One on One's
  - Review pipeline
  - Review good and tough calls/meetings
  - Nurture and support
- Friday



## Management Schedule - REP

- Monday - Sales Training/Meeting
- Tuesday - Got a minute meeting
- Wednesday - Hot Seat
- Thursday - One on One's
- Friday - Best Practices meeting
  - Reps get together without management to discuss what they are seeing
  - I've used this meeting for product training as well



## Management Schedule - YOU

### Block off time to review:

- Appointments on your rep's calendar
- Number cold calls/dials rep is making
- Email review
- CRM/Reporting/Dashboard numbers
- Pipeline follow-up
- Hot Sheet opportunities
- Conduct Ride Alongs with your rep
- Listen to call recordings

**What do I do if  
someone is  
underperforming?**



**K**

**P**

**I**

Sales Team dashboard			
CLOSED Opportunities	ICON Appointmets (lead source shown)	186	
	showed up/Discovery Call/Presentation	119	63.98%
	Qualified for Agency	72	60.50%
	Opportunity - scheduled another call	66	91.67%
	Won	18	27.27%
	Avg Sales Cycle	35.61	Closing Percentage
	Avg calls to close	2.611	
	Contractual value of WON	\$419,607.00	
	Lost	20	
Open Accounts	Open Opportunities	18	
	Contractual value in pipeline	\$360,674.00	
	Average time projected Contracts have been in the pipeline	10.17	
ERROR accounts	Opportunities with no Next Steps	10	
John Smith Dashboard			
CLOSED Opportunities	ICON Appointmets (lead source shown)	57	
	showed up/Discovery Call/Presentation	41	71.93%
	Qualified for Agency	33	80.49%
	Opportunity - scheduled another call	19	57.58%
	Won	6	31.58%
	Avg Sales Cycle	37.33	Closing Percentage
	Avg calls to close	2.500	
	Contractual value of WON	\$121,000.00	
	Lost	6	
Open Accounts	Open Opportunites	5	
	Contractual value in pipeline	\$130,800.00	
	Average time projected Contracts have been in the pipeline	2.44	
ERROR accounts	Opportunities with no Next Steps	2	



## Performance Improvement Plan

1. A PIP is triggered if you go a month with less than 4 sales
2. Once the PIP is triggered you must make an average of 50 dials a day (250 a week) for two straight weeks and record 2 agency sales.
3. If you make 500 dials AND 2 sales within that 2 week period then you are off the PIP
4. If you make less than 500 dials AND 2 sales then you are let go (loved out)
5. If you get off the PIP then the time frame is reset back to the original minimum of 4 sales in a month.
6. If you have 3 months in a row where you get on a PIP, you are let go.





# Thanks!

*Any* **questions** ?

\*I'll send the slide deck over after this