

The Ultimate Guide to Sales Management



Strategies and resources to make your sales team high-impact players for your business.



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Why You Need Sales Management

Sales managers are uniquely powerful when it comes to boosting your bottom line.

Think about it this way: If you're a sales manager and you help each of your 10 reps sell 20% more, you've essentially just "created" two new salespeople.

In this guide, we'll cover the reasons why getting sales management right is so important. We'll also discuss some sales management processes, strategies, and resources to help your team become high impact players for your business.

We hope you find this information helpful. If you have any questions, feel free to reach me at 800-834-4910 or at inbound281.com.

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Source credit: [HubSpot.com](https://www.hubspot.com). Written by Kristen Baker.

When considering how to boost your revenue and grow your business, what comes to mind? Evolving your product line? Reaching your audience in new ways? Launching a brand awareness campaign?

Have you ever considered the team working to sell your products? Specifically, the managers who lead your sales teams? These are the folks who oversee the team that communicates directly with your prospects and customers on a daily basis.

Although your product line, buyer personas, and brand awareness are important, sales managers are uniquely critical to the success of any business. They have the potential to unlock huge returns that impact the business's revenue and growth.

Think about it this way: If you're a sales manager and you help each of your 10 reps sell 20% more, you've essentially just "created" two new salespeople. Sales managers are uniquely powerful when it comes to boosting your bottom line.

In this guide, we'll cover the reasons why getting sales management right is so important. We'll also discuss some sales management processes, strategies, and resources to help your team become high impact players for your business.

Sales Management

Sales management is the act of overseeing and leading sales representatives to create strong relationships with prospects and close more deals.

Sales managers do this by implementing sales management processes, strategies, and objectives to help their team hit or exceed their targets and goals.

Sales Management Process

Sales management isn't a linear process — everyone's [strategies](#) and [responsibilities](#) look slightly different depending on their team, products, and resources. (We'll talk more about these throughout this piece.)

Generally, sales managers manage at least four main components: people, strategy, activity, and reporting. These are the four "steps" of the sales management process we'll cover below.

Sales Hiring and People Management

A sales team is only as good as their manager, and in order for he or she to lead an outstanding team, they need to first hire outstanding people. The first part of the sales management process is hiring a solid sales team. This involves writing strong job descriptions, interviewing eligible candidates, and working with HR to create fair [sales compensation](#) plans. This stage also applies to people management. This involves sales training and coaching, as well as team-building and morale-boosting activities.

Sales Strategy Development and Management

Sales managers are responsible for setting the vision and strategy for their sales team. One critical part of this is building the [sales process](#) that their team will follow. This process keeps the team aligned and working toward the same goals by following the same steps, ultimately creating an autonomous, well-oiled machine.

Developing a sales process will also allow management and to identify inefficiencies and notice where their team can improve.

Sales Activity Management

Next, sales managers are responsible overseeing the day-to-day activity of their sales team – from prospecting to close. This involves celebrating wins, understanding losses, and advocating for the team as a whole.

Sales management is just as much as the people as it is about the sales. This means that managers should keep a close eye on daily sales activity and address issues and wins when necessary.

Sales Reporting Management

The last step in the sales management process is analyzing and reporting on sales activity. Like with a sales process, sales managers should also create a systematized reporting process so their sales team knows where and when they're being measured as well as how they can improve. This process could include reporting on win rate, average sales cycle, and lead-to-opportunity conversion rate.

Sales managers are also responsible for using this data to forecast future sales revenue and update team standards and goals.

Sales Management Strategies

1. Establish compensation expectations.
2. Set goals and quotas.
3. Onboard and train new hires.
4. Motivate reps.
5. Act as liaison between reps and leadership.
6. Create sales and revenue reports.
7. Evaluate and adapt the sales process.

Here are seven sales management strategies that will help your reps grow, feel motivated, supported, and driven, and – most importantly – close more deals.

1. Establish compensation expectations.

Creating compensation plans that include details about base salary and commission is important to set accurate expectations for your reps. (You may or may not find yourself working with higher-ups and/or HR on this.) Setting these expectations and plans for all team members are critical parts to maintaining strong relationships with both existing and new customers.

Why would this be?

If reps start work at your company and learn they don't make a commission on house accounts, there's a large chance they're going to focus their time and energy on new customers instead since this is how'd they'd make a greater profit. This could cause you to lose existing, valuable customers.

Consider factors like these, along with your business's resources and plans for company-wide growth, while developing your reps' compensation plans.

2. Set goals and quotas.

Set goals and quotas for your entire team, as well as for individual reps, so you can ensure everyone is working together and pulling their own weight.

You can [set a variety of types of sales goals](#) for a number of different things including activities, job functions, training, and anything else you see fit. Be sure to clearly communicate these goals and quotas across the team (and to both your higher-ups and other teams, like marketing and support, at the company if necessary). This way, everyone knows what's expected of them and they understand what they're working towards. You can do this during team or one-on-one meetings or add the information to the reps' [sales enablement kits](#).

3. Onboard and train new hires.

Onboarding and training new hires is another sales management responsibilities. Depending on your resources, you may or may not be the sole person responsible for onboarding and training new hires, but being a part of these processes is important no matter how your business goes about them.

By being a part of onboarding and training, you can make sure all reps start on an even playing field in terms of the information they have about your current processes and systems. You can provide reps with the information they need regarding your customers and products to begin closing deals.

This also includes training on the technology your team uses to chat with customers and work on deals — like a [Sales Hub](#) with various features that help reps move prospects from an early-stage lead to become a delighted customer. With this knowledge, reps will be prepared for the types of conversations they'll have with customers, learn about your buyer personas, and study the product features they're expected to know inside and out.

4. Motivate reps.

As a sales manager, you're a motivator for your reps. Whether they have a rough call with a customer, are unable to reach their quota the first month they're at the company, or are going through something personal, you need to be there for your reps. Ask your reps what motivates them so you can tailor certain interactions to their preferences. You can also host one-on-one and team meetings, as well as [team-building events or outings](#), to ensure everyone is feeling supported and motivated to succeed.

5. Act as liaison between reps and leadership.

The position of sales manager lies between reps and higher-ups (such as directors, executives, or even, senior managers, if your company has them). Your role requires you to act as the liaison between these two groups of people and advocate for your reps' if and when necessary. This might involve discussing raises or promotions for your reps with higher-ups and HR, or simply sharing details about their successes across the organization.

Here are some more examples of the information you may relay between the reps and higher-ups.

Information From Reps to Leadership

- Details on how to improve the product line based on information from customers
- Any overall marketing, support, or brand feedback from customers
- Positive testimonials from delighted customers that are worth sharing with the organization

Information From Leadership to Reps

- Company-wide long and short term goals regarding growth
- New products and services being developed
- Any information about investors, revenue, etc. directors and executives decide they want to share with employees

6. Create sales and revenue reports.

Create and analyze [various sales and revenue reports](#). As a sales manager, it's your job to compile and analyze data to review the success of your reps both individually and as a whole. These reports are not only for your eyes, but they should also be reviewed with your reps so they know how they're doing and whether or not they're on track to meet (or, hopefully, exceed) expectations.

These reports are also crucial to provide your higher-ups so the rest of the organization knows how well you're doing and can provide feedback on what they need from you and your team to continue growing the business.

When [creating your sales and revenue reports](#), you'll be able to determine the following (and more):

- How much revenue is coming through as a result of the work of your reps
- How productive your reps are in terms of closing deals and communicating with prospects
- Which products/services are sold most frequently and successfully
- How often leads are transferred to your reps (and how often they're then contacted by those reps)
- Which of your assets are used most frequently as the first conversion point for contacts who end up becoming customers

7. Evaluate and adapt the sales process.

A [sales process](#) is the method by which your reps help move early-stage leads to become loyal, delighted customers. Strong sales teams almost always have a sales process, or framework, in place for reps to follow and move their prospects towards closing. This ensures consistency for all prospects, no matter which rep they're working with, and professional encounters among reps and prospects that represent your brand accurately.

However, it's important to remember the sales process will likely need to be updated as your company grows and changes. Whether it's because you have new products, a larger team of reps, or different [buyer personas](#), you'll have to make sure your sales process is up to date and relevant. This way, it remains a helpful and powerful tool for reps to refer to throughout their time on your team.

Now that we've reviewed common sales manager strategies to consider implementing, let's review your sales management responsibilities.

It's important to note that the responsibilities you have as a sales manager — along with the skills required of you — are vastly different than those you experienced as a rep. (Note: Virtually every sales manager worked as a rep at one point in time.) Sales management revolves around people management, leadership, and data analysis (whereas your work as a rep is likely revolved around more prospecting, communication, and time management).

Let's dive in.

1. Coaching

This is arguably the most important part of your role. Help your reps maximize their performance by figuring out where they need to improve, ensuring they're prepared for any situation that may come their way, and teaching them new skills to make them more efficient.

You can accomplish all of this through one-on-one feedback sessions, role play, and introducing them to new technology and/ or mentors on the team that could simplify their everyday tasks.

2. Recruiting

Be on the lookout for potential new members of your team. After all, hitting your sales goals is hard enough when you have the headcount, let alone when you're short sales reps (and rep turnover is very common in the sales industry).

So, how do you combat this?

Consistent recruiting ensures you'll always have a pipeline of strong candidates who'll be ready to dive in when it comes time to replace a salesperson or grow your team. Spend an hour every day browsing recruiting sites like [LinkedIn](#) for potential candidates. Reach out to the people you're very interested in and set up a phone call or meeting over coffee to learn more about their previous experience in the field.

3. Shadowing

Catch developing issues before they become larger problems, identify best practices and fresh strategies to share with the wider team, and learn valuable information about your reps' current operations by shadowing them. Depending on your sales process, you might be able to listen to their calls and/or join their meetings to assist with this process.

4. Meeting and Aligning

A sales department touches almost every other aspect of a business, so make sure your team is consistently in communication and alignment with other teams including marketing, product, customer support (and any other relevant departments).

This way, reps have relevant content to provide prospects, accurate details about product features, information about the support customers receive throughout onboarding and their time as a customer, and more. You should also regularly meet with your sales executives to share how your team is performing and to review the high-level company goals so you can share those with your reps and get them excited about where the company is headed.

5. Reporting

As mentioned above, a major component of your job is [reporting on and analyzing data](#). Not only should you look at the numbers across the team, but you should also dig into individual rep performance to ensure one member of the team isn't carrying the load — or bringing down averages drastically.

Examples of this type of data includes:

- How far you are to goal at any given point in time
- What your projected weekly, monthly, and quarterly performance looks like
- Any trends regarding the point in time deals tend to slip
- Variations in average [win rate](#)

You can obtain and manage all of this data (and more) with the help of [Sales Hub software](#).

6. Managing Time

Often times, when managing a team of people, it can become all too easy to let your days become consumed with putting out fires. However, to be an effective sales manager, you must master [time management](#).

Rely on email and office hours rather than chat platforms to communicate with reps, provide them with feedback, and answer their questions. As Sales Consultant Jeff Hoffman says, “Instant message tools enforce LIFO: Last In, First Out. In other words, the most recent message tends to get the first reply. It’s unproductive and unfair.”

Asking reps to book time on your calendar for requests or come by your desk during office hours guarantees they’ll only come to you with issues they can’t solve on their own. It teaches them to be more autonomous and saves you time — a win-win.

[Use free meeting scheduling software so reps can book time on your calendar.](#)

Additionally, although you might miss the glory days of closing deals, resist the urge to take over any of your reps’ opportunities. In the long run, you’re not doing them (or yourself) any favors. Remember the adage, “Give a man to fish and you feed him for a day; teach a man to fish and you feed him for a lifetime”? That applies here. Jumping in robs your rep of the chance to learn and means you’ll have to do the same next time around.

Finally, prioritize all tasks. With so much going on, it’s easy to run around tackling the most visible or time-sensitive tasks. Yet, those aren't always the most important. At the beginning of each day, organize a to-do list by impact and urgency. The top items should be both impactful and urgent, the next should be impactful but not urgent, followed by urgent but not impactful, and lastly, neither urgent nor impactful.

Now that you have a better understanding of your sales management responsibilities, let's review some resources that will help you (and your reps) excel.

Tools and Resources for Sales Managers

Sales management resources can simplify your work (and the work of your reps), help you complete your tasks and responsibilities more efficiently, create a bigger impact on your team, and become a stronger leader.

HubSpot Sales Hub

[HubSpot Sales Hub](#) is a priceless sales management resource. It can save you and your reps precious time, act as an all-encompassing database (where reps can input their prospect and deal information), and help you close more deals, faster.

Here's how your team and bottom line can benefit from using Sales Hub:

- Automate and personalize outreach
- Create and share email templates
- Automate logging for contact information, email opens, and clicks
- Get notified when leads open your emails
- Organize all of your reps' activities in one place
- Connect with prospects via live chat on your website
- [Sync with your CRM](#) to track your entire pipeline

HubSpot CRM

The [HubSpot free \(forever\) CRM](#) is about more than just contact management. For sales leaders, the CRM offers real-time visibility into your sales pipeline and allows you to offer your sales team priceless tools – including email tracking, meeting scheduling, live chat, and more.

Pipedrive

[Pipedrive](#) is a sales and sales management CRM. The software helps optimize your sales process with powerful pipeline management, sales forecasting, deal tracking, and reporting. Bonus: Pipedrive integrates with your HubSpot account.

Aircall

[Aircall](#) is a cloud-based phone system that helps you reach and track conversations with prospects and customers. The tool connects with your CRM and Helpdesk solutions, allowing you to intelligently connect with and support your customers. Aircall connects with HubSpot CRM and Sales Hub to better streamline your deal tracking and reporting.

Sales Management Books

Learning from sales experts can help you be a better sales manager and leader. Here are four sales management books we recommend reading to help you improve your techniques.

1. Coaching Salespeople into Sales Champions: A Tactical Playbook for Managers and Executives

[By Keith Rosen](#)

This book will help you coach your reps into top performers more quickly than you thought possible. To help you achieve this, the book includes case studies, a one-month “Turnaround Strategy” for struggling reps, coaching scripts and templates, and pre-written questions.

2. The Accidental Sales Manager: How to Take Control and Lead Your Sales Team to Record Profits

[By Chris Lytle](#)

When you became a sales manager, were you promoted from the front lines without much support to handle the transition? This common issue is known as the “sales management trap”. This book will give you applicable tips to help you through this transition. It also helps you take off your selling shoes and instead, lead your reps to effectively sell on their own.

3. Cracking the Sales Management Code: The Secrets to Measuring and Managing Sales Performance

[By Jason Jordan](#)

From the metrics and processes you should be tracking and optimizing to prioritizing competing sales goals, this book acts as a practical guide on the ways to manage a growing sales team . The comprehensive resource will help you improve your day-to-day and yearly results across the team.

4. Sales Management. Simplified.: The Straight Truth About Getting Exceptional Results from Your Sales Team

By Mike Weinberg

This book reveals the reasons why sales teams typically fall short of their goals and how sales management style and tactics are often to blame. With a combination of straightforward, tell-it-like-it-is advice and entertaining anecdotes, this read will help you avoid the common mistakes that can be detrimental to any sales team's success.

Begin Managing Your Sales Team

Sales management isn't a simple process, but it's a critical role that can impact your business's bottom line. There are a lot of moving parts and intricacies, but with the right strategies and processes, you can effectively manage your reps, team goals, and all relationships (both internal and external).

So, begin thinking about the sales management strategies you'll implement on your team and the resources you'll incorporate to help you along the way.

About Inbound 281



A Growth Agency

Inbound 281 is a full-service, growth-focused digital marketing agency. We help businesses grow by improving their marketing to increase sales, revenue and profits.

We help owners, marketers and sales managers who are looking for new ideas to help sales hit their targets. Often times they are frustrated that, after all the time, efforts and money they have invested, they're still not getting the results they were expecting.

Our sights are set on lead acquisition, lead conversion, and conversion rate optimization. We specialize in multi-channel digital marketing, including content marketing, web design and development, SEO, pay per click, and social media.

Ready for a Conversation?

What's your dream result? Let's get the digital marketing conversation started!

Looking for new customer acquisition, lead generation, client engagement or a competitive advantage? We're ready to learn more about your goals so we can help you build a Marketing Road Map to help you achieve your goals.

[Schedule a Conversation](#)

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