SalesandService Excellence

ESSENTIALS

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Essentials of team leadership

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DO WE HEAR EACH OTHER?

Sometimes, we hear only a fraction of what's been said

Sharon Drew Morgen

Leadership Excellence

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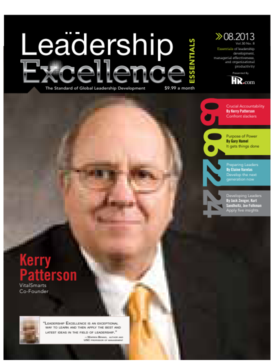

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Have you ever misheard clients or colleagues, made erroneous assumptions, and lost business as a result? PG.05

Features

"*Most people think "selling" is the same as "talking". But the most effective salespeople know that listening is the most important part of their job" – Roy Bartell*

Listening is a crucial aspect of a sales process, and you stand to lose business if your salesperson mishears clients and makes erroneous assumptions. Our Cover Story ***Do We Hear Each Other?*** by Sharon Drew Morgen deals with this topic.

Did you know that we don't always accurately hear what others mean to convey? Sometimes we hear only a fraction of what's been said!

Sharon Drew says that our brains misunderstand or bias the rest – and we might not realize it until it's too late, causing us to believe we're right and others are wrong, or take action using wrong assumptions. Thus, we're left with restricted communication and creativity, failed relationships, and lost profit.

Want to know more? Read our cover story of the month.

Similar to listening, demos are also a fundamental part of a sales process. That said, can demos sabotage sales? Definitely, yes! This is why one should know when and how to make a presentation.

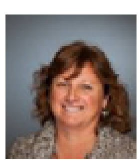
Darrin Fleming in his article ***When Demos Sabotage the Sale*** tells us why it is important to pace yourself when it comes to demos. Read the article to also understand the best practices to follow before doing one.

We have heard of the Golden Rule, "Treat others as you would like to be treated". How about then "Treating others BETTER than you have ever been treated". Sounds interesting, isn't it?

Read our featured article ***Breaking the Golden Rule*** to know why author John Tschohl asks us to forget the old saying and imbibe the new one. He also lists down a few guidelines to follow in order to build a strong customer service culture at your organization.

Can setting quotas earlier drive better results? Yes, argues Joseph DiMisa in his article ***Setting Quotas Earlier***! Because clarity about "the numbers" puts representatives on the right path, with the right mindset to accomplish sales results. Make sure your representatives know their numbers before they start to sell. Now hurry and get the process both started and completed prior to the year starting!

We also have a great bunch of other interesting and thought-provoking articles for you in this issue of *Sales and Service Excellence Essentials*. Enjoy reading and do not forget to mail us your feedback!!



Regards,
Debbie McGrath
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Do We Hear Each Other?

Sometimes, we hear only a fraction of what's been said

By Sharon Drew Morgen

Have you ever misheard clients or colleagues, made erroneous assumptions, and lost business as a result?

Have any of your relationships suffered because you misunderstood an intended message – and possibly acted on your misunderstanding as if you heard accurately?

We don't always accurately hear what others mean to convey. Sometimes we hear only a fraction of what's been said because our brains misunderstand or bias the rest – and we might not realize it until it's too late, causing us to believe we're right and others are wrong, or take action using wrong assumptions. We're left with restricted communication and creativity, failed relationships, and lost profit.

Assessment

Take this assessment to see how you fare:

- How often do you enter conversations to hear what you want to hear - and disregard the rest?
- How often do you listen to get your own agenda across, regardless of the needs of the speaker?
- How often do you have a bias in place before the speaker's points or agenda is known?
- Do you ever assume what the speaker wants from you before s/he states it - whether your assumption is accurate or not?
- How often do you listen merely to confirm you are right… and the other person is wrong?
- Do you ever enter a conversation without any bias, filters, assumptions, or expectations?
- What would need to happen for you to enter all conversations with a totally blank slate?
- Do you have the tools to make that possible?

Because your filters, expectations, biases, and assumptions strongly influence how you hear what's intended, how do you know that your natural hearing skills enable you to achieve everything you might achieve in a conversation?

How much business have you lost because of your inability to choose the appropriate modality to hear and interpret through?

How many relationships have you lost by driving conversations where you wanted them to be rather than a path of collaboration that would end up someplace surprising?

Notice any patterns? And none of it is your fault.

IT'S OUR BRAIN'S FAULT

We all try to attend carefully to what's being said. Yet our pesky brains do some pretty sophisticated stuff, all without our conscious consent: they

- Delete or misconstrue or filter out what sounds wrong or goes against our beliefs or is unfamiliar, then
- Matches what's left with a historic memory of a 'similar-enough' conversation and
- Throws out what doesn't match that memory.

Whatever is left is what we believe has been said. And we're convinced of it.

However, it doesn't happen all the time. In conversations with familiar folks – family members, some work colleagues - there is less of a gap; with folks we don't know - clients, folks in other departments or from other countries - in dialogues that are outside of our habitual knowledge base, or when we enter conversations with a rigid goal, we accurately understand far less of what was actually meant.

A problem occurs when we're convinced that what we heard is accurate, and don't know when, if, or how, to take measures to fix a problem we don't believe we have. As a result we unwittingly compromise relationships, business, partnerships, creativity, and success. How many team meetings have you had in which people have misheard each other to the point that an initiative is compromised, or a deadline must be delayed because of misunderstandings?

With little control over what our brains tell us we've heard, we're left with the fallout:

- Misunderstandings that remain unresolved because we believe – we're certain - we're right;
- Bad feelings and takeaways caused by misheard communication;
- Biased assumptions that cause inadequate responses and failed initiatives;
- Misheard facts that lead to inaccuracies in business, technology, relationships;
- Restricted creativity, laps in leadership, therapy, coaching, and medical advice.

We misunderstand doctors, make assumptions with our teenagers and vendors, bias communications with family members and colleagues, set up filters before conversations with historic relationships. Our lives are influenced by how accurately we hear what others mean to convey.

How to Exit

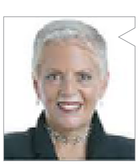
One of the solutions is to recognize that this sort of thing happens frequently, and to take the extra time to ask if you heard correctly during important interactions: do not assume that what you think you heard is accurate.

Next, check the body language of your communication partner: do you notice any confusion? Is there any indication that the dialogue is not moving forward with ease and collaboration?

In my book *What? Did you really say what I think I heard?* I discuss the specifics of how to give yourself a trigger when there seems to be discomfort going on within a conversation, and at that moment, pull away from the middle of the conversation to take a dispassionate look at how the conversation is progressing and notice anything you might have just said that may have caused disruption. Responses are sometimes so automatic that we don't have the distance to have an impartial view of our own behaviors. There is a rule we all need to consider during conversations:

If what you're doing works, keep doing it. Just know the difference between when it works and when it doesn't and be willing to do something different the moment it stops working. Otherwise, you're either lucky or unlucky, and those are bad odds.

How we hear others is too vital to depend on our flawed brains and how they determine for us what we hear others say. Let's understand why we make the assumptions we make, and have the skills to enable creativity, brainstorming, and possibility with all of our communication partners. **SSE**



Sharon Drew Morgen is the author of *What? Did you really say what I think I heard?,* a book that not only breaks down every aspect of how we interpret what we hear and how our brains limit our ability to hear others, but also offers ways to intervene our automatic behaviors and hear others as they intend to be heard. The book is offered for free (no signup required) at www.didihearyou.com

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Customer Service

Serve customers throughout the year

By Joanna G. Jones

October is the month where for one week each year we celebrate National Customer Service week. Setting aside a week annually to recognize and celebrate customers and the employees who are critical in delivering excellent customer care is a great way to reflect on the focus of customer-facing businesses, but what about the other 51 weeks of the year? Delivering great customer service is often a 24/7 job, with little to no downtime, so while it's important to pause and celebrate one week a year, there is much that can be done throughout the year to keep the focus on improving the workplace and customer service delivery.

The only given in customer care is that it is in a constant state of flux, which is why it requires year-round focus. While it is easy to feel overwhelmed by the changing landscape in which customer care is delivered, there are a number of efforts that managers and leaders can make that don't require long-range planning. We'll look at five strategies that your organization can implement and focus on throughout the year to keep your employees motivated and engaged and your customers loyal. Below are five areas of focus that can be readily implemented throughout the year.

Focus #1: Relevant Advice

Training involves more than just educating your employees about company protocols, policy and mission. In order for employees to deliver outstanding service they need to connect with your customers as people. When managers and trainers offer employees real-world advice that is relevant to what the customers are demanding, the employees can better understand the bigger picture and objectives of your organization and integrate the mission of your organization into customer service delivery. Experienced, successful customer-service agents can offer valuable insight into the difference between meeting performance benchmarks and exceeding them, so find a way to incorporate best practices by your top agents into regular training sessions.

Many organizations have found "lunch-time" training courses a great way to incorporate more informal training sessions into the work day.

Focus #2: Training Doesn't Need to be Formal

Successful managers, know how to listen and respond to your employees and then integrate their input with your overall objectives. Training doesn't always need to be scheduled and formal. You can provide coaching/training at any time and any place when appropriate. Remember that often less is more, so be mindful not to be long-winded when trying to make a point. Often it is most effective to offer your employee a short piece of advice that is immediately relevant to a specific situation. When messages are communicated during these less formal interactions they are often received more clearly and accurately, as they aren't lost in a longer training session. When training relates to the job at hand it is better received.

If you incorporate relevant training throughout the working day, agents are better able to connect with your customers as they are empowered with the relevant tools that your customers are seeking.

Focus #3: Individualize Training

In call-centers, your software and equipment are the equalizer between employees. What gives your organization personality are your agents, as they bring their own strengths and skills to the workplace. Training should be representative of the many personality types and be tailored to your agents to help them develop their skills without over-emphasizing any one specific area. This isn't about training each agent individually, but perhaps performing basic personality tests and then tailoring your training program to best enhance those personality types so the various skill sets of individuals can be cultivated.

Focus #4: Staff Engagement

To deliver effective training that maximizes ROI, look closely at what skills are needed within your team. Inbound call center employees are often trained on product awareness, complaint management or patching the customer through to the appropriate department. In outbound call centers, training often focuses on ensuring employees have the knowledge and tools to advise and upsell customers on the best product fit, service or upgrade. While training around your organization's core products and expectations are important, equally important is engaging your employees so they can get answers and support with issues they encounter while servicing customers. When employees feel that their input matters and that communication is a two-way street between staff and management, what follows is improved customer engagement and happier employees. Both outcomes are a win-win for your organization.

Focus #5: Training Never Ends

While formal training sessions may be scheduled at set points throughout the year, informal training takes place daily. Department budgets should include committed resources for continuous training and development. Training, whether formal or informal, not only nurtures the technical ability of your agents but also increases staff engagement, resulting in more motivated employees with less turnover. Training programs need to remain nimble and relevant to your market and customer demands. Staying engaged with your staff and understanding the data and metrics of your call-center, allows managers to customize the on-going training required to remain current to the ever-changing environment of customer care delivery.

Successful managers utilize many tools and skills to keep employees engaged and motivated. Focusing on training and opportunities for engagement is an on-going process and can be customized to meet the needs of your employees and organization. While formal training throughout the year is important, incorporating spontaneous and casual training sessions are often just as effective. Celebrating *National Customer Service Week* is a great opportunity to reflect on where your company has been and where it wants to go. By remaining focused on customer service improvement throughout the year, you can be assured that when *National Customer Service Week* is celebrated next year, you'll have much to celebrate and be proud of. SSE

Joanna G. Jones is Executive Creative Director at Jones & Quinn.
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When Demos Sabotage the Sale

Pace yourself when it comes to demos

Interactive

Case Study — Helping Prospects Visualize the Need for Change: The Halogen Story

By Darrin Fleming

Demos are a fundamental part of the sales process. Not only are they a great way to engage prospects, they frequently open the door to a deeper conversation about how you can collaborate to solve the prospect's most pressing business challenges.

That said, the demo can definitely sabotage sales — particularly for anyone selling complex offerings with long sales cycles. Specifically, the number one mistake I see is showing the demo too early in the buying cycle. Sometimes it's the sales professional who pushes too soon for a demo. Other times, the prospect asks to see the demo, and the salesperson takes the request as a good sign and leaps at the request. Based on my experience, however, you always want to pace yourself when it comes to the demo. Here are two reasons why.

1) You might not be dealing with a decision maker.

Generally, decision-makers tend to care less about demos and more about how you can solve a business problem. In many cases (particularly in the software world) the person who wants to see the demo is the person who will actually be using your offering. If that's the case, they're just curious to see how it works and whether they like it.

2) You become trapped by objections about features or superficial aspects of your offering.

When prospects watch demos, you want them to be in the right frame of mind. Show them a demo too early, and they're highly likely to focus on the aspects of your offering that they don't like or perceive as imperfections. This is how you get caught in a web of such silly objections as, "This tool won't work for us because that button is green and our standard is blue."

Before you do the demo, you want to be sure you've laid the proper groundwork for a collaborative mindset. That means waiting until prospects are 1) aware of their business problem and how much it's costing them, and 2) are committed to solving that business problem. At this stage, they're much more likely to focus on why your tool is a compelling solution to help them solve their challenges.

One metric I favor looking at is the demo-to-close ratio. The desired value varies quite a bit by industry, but you can always measure it against other salespeople in your organization. I'd bet that top performers have lower ratios. Salespeople who throw demos around like candy at a parade are wasting their time and maybe even turning prospects off.

So, when is the right time to show a demo? Obviously it depends a bit on the nature of your solution and the sophistication of the buyer. For complex sales, I generally say that anyone who asks for a demo is likely not a decision maker and should be treated accordingly. The right time to show a demo is when you know you're talking with someone who is interested in business outcomes rather than the features of your offering. If that's not the case, use the right questions (for example, "Who will be involved in the decision to move forward with this? Can we set up a meeting with the team?") to bump the conversation up the decision food chain. **SSE**

*This article first appeared **here**.*

Darrin Fleming is Managing Director at Stratavant. His ROI selling tools have helped B2B technology and industrial organizations including Honeywell and Avaya quantify their value.
Connect **Darrin Fleming**
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Mobile Marketing

The future (and present)

By Laurence Abrams

What is mobile marketing?

Remember all those advertisements and applications that pop-up whenever you log in from your tablet, cell phone, phablet (or any other portable device) to your Facebook, Twitter or any other social media account?

Mobile marketing means marketing on some type of mobile device (cell phone, phablet, tablet, etc.)

In today's world, using the Internet outside your house and office desktop environment is becoming increasingly popular. In order to stay connected with their customers, mobile marketing has become a vital marketing channel for many businesses.

Mobile marketing is mostly part of many other social media channels like Facebook, for example. Now, given that 500 million people have Facebook applications on their mobile devices, it sounds like an excellent way to generate more potential customers and expand your business. To put things into perspective, majority of businesses with customer-facing applications have more than a 75% increase in the application audience over the past year.

Internal Applications and Push Messages

Internal applications and push messages have also shown to be very efficient when it comes to generating potential customers. As more and more people rely on their portable devices to do their job, applications have a significant role in communicating, purchasing, training, etc.

Make it personal! Speaking of applications in marketing, your customers likely have dozens of applications, competing for their attention. In order for your application to be the one on top of the list, there are some useful tricks and tips you can use. First of all, increase and personalize engagement in applications and target specific audiences. Send targeted and personalized push messages to your customers based on any piece of information you have about your audience. This is a great way to attract your customers' attention. By making it personal and showing that you appreciate each and every one of them as an individual is something that will set you apart from your competition.

Mobile Messages

Get your customer's attention in real-time, and engage them in the moment by sending ready-made SMS and MMS templates that are extremely easy to send. Old-fashioned messaging has never been easier, and it has proved to be effective.

The Power of Connected Devices

Through connected devices, not only can you reach your customers both online and offline, but also gather valuable information about the needs and preferences of your most loyal customers. **SSE**

*This article first appeared **here**.*

Laurence Abrams is President/CEO at Paperless Proposal. Laurence is a successful serial entrepreneur, passionate mentor about the use of technology and innovation within organizations to differentiate, streamline, and automate the organization's sales processes and solutions to create explosive growth. Laurence developed Paperless Proposal for GMI out of the need to differentiate his company in the sales and marketing process from his competition.
Connect Laurence Abrams
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Breaking the Golden Rule

Treat others BETTER than you have ever been

By John Tschohl

The well-known Golden Rule… "treat others as you would like to be treated", sounds like an easy goal, but how true is it? How often do we complain about the way we are treated, but the very next day we are being trite and short with others? Normally, this wouldn't be so bad; we all have our good days and bad days. Our families and friends know the "true us", so we are often forgiven. However, what if the service sector was our job? What if our first impression was our last? What if our disposition caused a future customer to walk away to a competitor? Given this scenario, it's not so easy to chalk up our behavior to a "bad day".

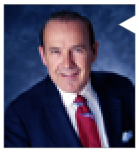
> **Bad service is seen by many consumers as a personal insult. They become angry, depressed, or insecure when sales people ignore them, snap at them or hurry to get rid of them.**

Unfortunately, every day employees in every capacity, make a choice NOT to treat others the same way they would like to be treated and their choice not only impacts their job but also the company's bottom line. The entire service process lasts less than three minutes. Bad service is seen by many consumers as a personal *insult.* They become angry, depressed, or insecure when sales people ignore them, snap at them or hurry to get rid of them. They are offended when salespeople haven't considered their customers important enough for them to learn the answers to common questions about the merchandize or service they sell.

Here are some guidelines to follow if your job entails one-on-one communication with a customer/client…

- **Know Your Job!** Many customers become frustrated because the salesperson is not well versed in a product they are asking about, or they are not well versed on inventory or procedure (such as a return or credit). Customers can have a very short fuse if they feel their time is being wasted. The more you know about your company, the better equipped you are to solve problems and innovate. Strive to learn as much as you can about your company. If there is a question you don't have the answer to… DON'T MAKE ONE UP AND NEVER EVER SAY, "I don't know", and do nothing to find the answer. If you don't know the answer, seek out a manger and ask him/her. A great thing to say to a customer is, "I don't have the answer, but I love learning so I will find that out for you and we will both have the answer. Thank you for asking!"
- **Think Twice about your Job Choice**. If you have a short-temper, hostility issues, or you naturally do not like being around people (an introvert) DO NOT seek a job which requires you to interact with the public. This is just going to exacerbate your comfort level. Seek out a job that doesn't require you to meet new people every day.
- **Leave Your Problems at Home.** This can be difficult, especially if something serious is going on in the background; HOWEVER, it is not fair to spread the poison. If you are having a particularly bad day, try your hardest to put the problem out of your mind and use your job as an escape from the problem, a kind of breather. Fake a smile. Try to see your customers as your allies who didn't create the problem you are dealing with.
- **Create a New Golden Rule**. Forget the old saying… treat others as you would like to be treated. How about… "Treat others BETTER than you have ever been treated". Wouldn't it be great to know that you could treat another person better than you have ever been treated and that you alone were responsible for that treatment? To be able to say, "I treat people way better than I have ever been treated", would be a great accomplishment. Go beyond where anyone else has ever been!
- **Think of Your Own Pet Peeves**. What drives you crazy? What gets on your nerves? Think about it then… DON'T do it. Maybe it annoys you when you wait for an exceedingly long time for someone to notice when you need help. Maybe you don't like it when the person checking you out is chewing gum. Take your pet peeves and turn them into a list of things you will never do. This can be a powerful tool. Many of us are hypocrites and accuse others of the very act that we are committing.
- **Try Turning Your Job into a Game**. Ask yourself how many people you can get to walk away with a smile in a day? How many people can you help today? These little tools can take the monotony out of an everyday job!

Many service employees do not think they have control over their job. This is completely untrue. The employee actually has more power than the manager. The employee is the one who interacts with the customer on a daily basis. The employee's performance of his/her job is what determines whether a customer comes back. Front line employees are the main artery in the business and keep the business alive. They consider customers as their partners in business. On your next day on the job… remember that! SSE



John Tschohl is an international service strategist and speaker. He is founder and president of the Service Quality Institute in Minneapolis, Minnesota. Described by USA Today, Time and Entrepreneur magazines as a customer service guru, he has written several books on customer service including the new 10th edition of *Achieving Excellence Through Customer Service.*
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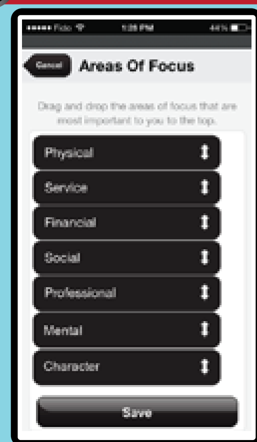
***Available Q2.**

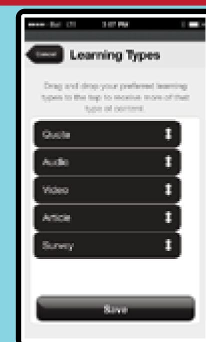
Employees choose the areas of focus they want to work on.

1 Choose area of focus

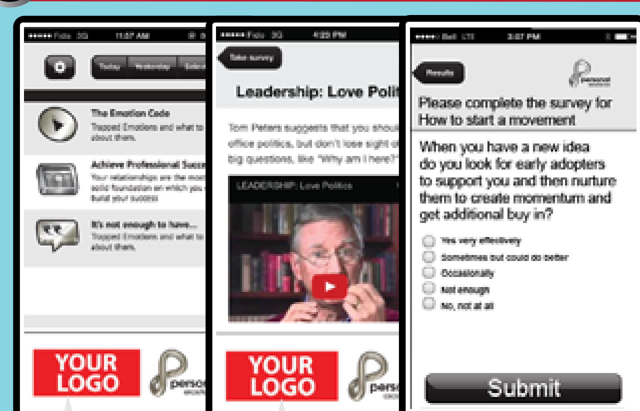


Employees choose how they learn.

2 How employees learn



3 Spend 3-5 minutes of the day



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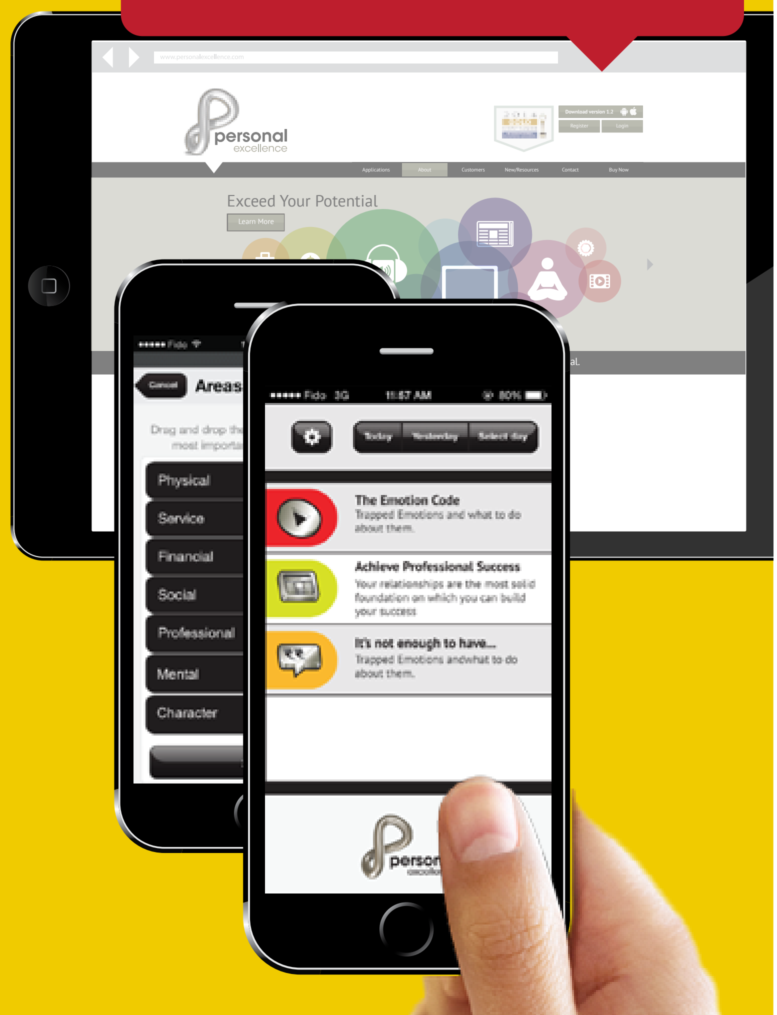

Do you wake up each and every day and say:

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Sales Call Psych-up

How to win a sale

By Jeff Davidson

Okay, my mission is to walk into that office and make the prospect wonder how his company has survived all this time without my help! The market might be bad, but I am good. Great, in fact. Hey, I'm a seasoned professional, and I'm fully qualified to help. Plus, I'm a creative thinker!

I'm energetic and have greater stamina than the average sale representative. I am positive that I will bring value to this company, and I know I can make them see it. I've given presentations over 200 times; this is another time, I just have to persuade a small audience. I am sure that I can confidently present.

I'm good with words and I speak in a poised, assured manner. I've been getting better and better at making eye contact with potentially intimidating prospects.

I've also researched the company and thoroughly prepared myself for any question they might ask, so my mind will be at ease and my words and explanations will flow. I know about current developments in this industry. I have intimate knowledge of it, because I've put in the time. My prospect will be impressed that I took the time to learn about the company and industry, and will immediately want to implement my solution.

I pressed my clothes and shined my shoes. My crisp, professional appearance and clear, convincing oral presentation will win the day. I will land this sale. When I'm looking sharp, I radiate confidence, and this prompts others to have faith in me.

I am confident and well-prepared. This sale is mine! **SSE**

Jeff Davidson, MBA, CMC, aka "The Work-life Balance expert"® offers keynote presentations and workshops on creating work life balance, managing the pace with grace, and thriving in a hyper-accelerated world. Jeff is the leading personal brand in speaking, writing, and reflecting on work-life balance issues, and he has a passion for speaking to organizations who want to help their employees make rapid progress in this arena.
Connect Jeff Davidson

Setting Quotas Earlier

Drive better results

By Joseph DiMisa

Many organizations turn to elaborate fixes to help drive sales results. These sales force effectiveness initiatives may range from more sales representative training or new product launches to new sales channels or overlay roles. All can be effective, but they also can be expensive and time consuming to design and implement. Additionally, it may take a while before they start to produce results. What if there was an easier way to gain more productivity without a lot of cost and without expending precious resources?

Could the solution be as simple as getting quotas to the sales force more quickly?

Over the past year, Sibson Consulting has been talking about quota setting with clients and participants at our Sales Forums and at compensation associations around the country. We've heard about the challenges of setting quotas early… and we've heard the excuses. We've also heard that timely quota setting and communication may be the key to making the sales plan goals each year.

The Problem with Setting Quotas

Many companies invest their time, energy and resources in the compensation plan design and numerous sales force initiatives for the new fiscal year leaving sales quotas as an afterthought, or a "plug-in" that links to the compensation plan.

Often there is a lack of accountability because no organization clearly owns quota setting. In some cases, the functional business organizations with the responsibility to set and administer quotas may have the least visibility to the true market opportunity. Additionally, there may be a lack of attention to the data because it is difficult to capture. As a consequence, targets get set only after HR asks for the numbers so the new compensation plans can be rolled out. Typically, the targets are not communicated until after the fiscal year has started.

According to a recent Sibson survey, on average only 25 percent of companies communicated their quotas to the sales teams prior to the start of the fiscal year (see *Table 1*).

***Table 1:* When does the company set, allocate and communicate quotas?**

Timing	Percentage of Respondents
Prior to start of fiscal year	25%
Month 1 of fiscal year	34%
Month 2	26%
Month 3	15%

Source: 2014 Sibson Consulting Survey

Can Setting and Communicating Quotas Early Impact Results?

Given that 75 percent of companies queried do not get their quotas out prior to the fiscal year beginning, how can representatives plan their first month, their first quarter, or set their personal goals for the year without knowing their goals? Good sales representatives and their managers are the most motivated and positive at the beginning of the year (see *Table 2*). Why not take advantage of this fact and get them the quotas earlier and take advantage of their motivation?

***TABLE 2:* WHEN ARE SALES REPRESENTATIVES MOST MOTIVATED DURING THE FISCAL YEAR?**

Timing	Percentage of Respondents
First 30 days of the year	64%
31 to 60 days into the year	10%
61 to 90 days in the year	3%
91 to 180 days into the year	9%
180 plus days into the year	14%

Source: 2014 Sibson Consulting Survey

Some may argue that communicating quotas at the start of the year may demotivate representatives if they deem the quotas as too high. Yet, when we asked what message a company sends when it delays quota communication, the results were startling. Forty percent equate late quotas with internal incompetence and 54 percent say the company has something to hide (see *Table 3*). Not a good way to start a sales cycle.

***TABLE 3:* WHAT MESSAGE DO LATE QUOTAS SEND TO THE SALES TEAM?**

Message	Percentage of Respondents
It just takes time…quotas are provided soon enough	1%
Company is still figuring out how much they need to grow	5%
Company is incompetent	40%
Company is trying hide the number	54%

Source: 2014 Sibson Consulting Survey

Increase in Productivity — Can You Count on It?

When asked, 68 percent of those surveyed said providing representatives with their quotas prior to the start of the year have a significant impact on productivity. In fact, the Sibson study shows that production can increase as much as 10 percent when representatives know their quotas ahead of the new sales year.

That same population says that waiting until the third or fourth month to announce quotas can dampen representative productivity by three to four percent respectively. (See *Table 4*)

***TABLE 4:* HOW DOES THE TIMING OF QUOTA COMMUNICATION IMPACT PRODUCTIVITY?**

Timing of Quota Communication	Impact on Productivity
Prior to start of fiscal year	+10%
Month 1 of fiscal year	+9%
Month 2	+1%
Month 3	-3%
Month 4	-4%

Source: 2014 Sibson Consulting Survey

How to Set Quotas Earlier

Setting quotas early in the sales compensation design process involves commitment to four actions:

1. Identify the Team

Designate an individual or group as the owner of the quota setting process. Ideally, quota setting resides in sales operations, but finance or sales also may lead the effort. Assigning responsibility for setting quotas and managing adjustments will enable consistency in management, accountability and timing.

2. Start Early and Gather the Right Data

Start quota setting when you start the sales compensation process. It is common for sales compensation design to start in the eighth or ninth month of the fiscal year. This is a great time to start the quota process too. The quota team will be in the same development cycle as the compensation team and will be able to work hand-in-hand when strategy and direction are being discussed. Allow at least 12 weeks to develop quotas.

Quotas are only as good as the data behind them, so the more data gathered the better. To set accurate and effective quotas, first determine marketplace potential and identify the factors that affect sales performance. The key is to gather as much information as possible to understand and make assumptions about customer needs, historic production, sales representatives' capacity to sell and corporate expectations. Organizations need to answer the following questions:

Data Needed		Why Important?
1.	*How does the organization define sales performance?*	The answer — volume, activities and/or revenue — helps define sales performance and target the right production
2.	*How predictable are sales results?*	The answer helps the organization understand the business cycles and the timing of sales results
3.	*What external and internal factors influence a representative's performance?*	The factors enable the organization to make adjustments based on conditions that may be out of a representative's control
4.	*What is a representative's total selling and non-selling time?*	The data show how much time a representative has available and his or her capacity to meet objectives

5.	*How many deals flow through the sales process? How long does it take? How much is the average deal worth?*	The answers put a realistic time frame on the length of a sale and the value of each step and ultimate production
6.	*How much is the organization willing to spend to achieve a sale?*	This identifies what resources should be used during the selling process and how much the organization can ultimately pay out for each sale
7.	*What is the incremental sales potential for areas where the representatives will do business?*	The answer provides insight into the sales potential in each market and/or area—it will help to align resources and set targets

If certain market information is unattainable, quotas may need to be more company-centric, relying on performance or internal growth assumptions rather than customer or market considerations.

Identify the Approach

> Clarity about "the numbers" puts representatives on the right path with the right mindset to accomplish sales results. Organizations spend millions on new sales initiatives to increase sales effectiveness, but ignore the power of a logical, quota-setting process and timely communication.

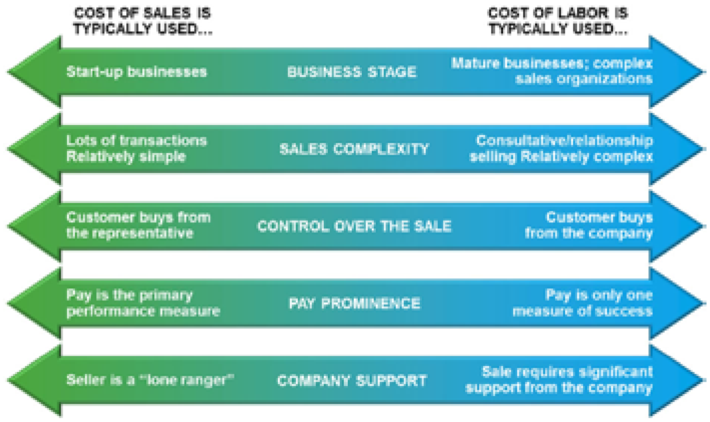
There are two ways to proceed when setting quotes: cost of sales or cost of labor.

Cost of sales looks at what it costs to sell the unit, product or service. Payouts may be based either upon a percentage of volume sold, or upon the individual unit, product or service that is sold. Typically, market data is not used, so the calculations are based upon the dollar amount that a company is willing to pay (i.e., 6% on everything a representative sells). The percentage is based upon the anticipated sales amount or the target/quota that is anticipated. This approach is simplistic in that the quota is secondary to the cost of sale. It is a very liner equation in that the more or less a representative sells, the more or less is paid.

Cost of labor is based more on what the industry might pay. Targets are set in order to stay in line with market pricing. A company is willing to pay a sales representative a certain amount (i.e., $50K in incentive) because that is what the market pays for this job. In this approach, compensation is directly tied to a quota or goal, or to the standard industry performance benchmark.

So which is the best approach? As shown in *Figure 1*, four factors can influence the quota setting approach: stage of business, sales complexity, a representative's control over the sale, pay prominence and company support.

FIGURE 1: **WHEN TO USE COST OF SALES *VERSUS* COST OF LABOR**



3. Get It Done

Clearly sales teams believe that getting quotas communicated early makes a difference, and our work with sales organizations in all industries backs that up. Clarity about "the numbers" puts representatives on the right path with the right mindset to accomplish sales results. Organizations spend millions on new sales initiatives to increase sales effectiveness, but ignore the power of a logical, quota-setting process and timely communication. Make sure representatives know their numbers before they start to sell. It really can be that simple. Get the process both started and completed prior to the year starting! **SSE**

Joseph DiMisa is a Senior Vice President in Sibson's Atlanta office with over 20 years of experience working with telecommunications service providers and other organizations on all aspects of sales, marketing, and customer service effectiveness. He is also the firm's Sales Force Effectiveness Practice Leader.DiMisa works with leading companies to develop and implement sales strategies and sales effectiveness programs that drive profitable growth.
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Future Business

Visual clues

By Elinor Stutz

Seasoned sales professional literally *look at the entire picture* in order to appropriately build relationships, build business possibilities and finally, secure the sale. The clues exist everywhere, but the two most important areas are found when sitting in front of a prospective client, and in their office. Should it be a larger company, clues are found throughout the entire building.

The Person

As you begin a dialogue regarding the other person's predicament, and how you may help solve their problems, body language becomes a huge indicator of their interest level.

- Smiles and hospitality are a great beginning
- Raised eyebrow indicates concern and possibly disbelief
- Crossed arms show a question needs to be addressed immediately
- Looking at one's watch indicates no interest
- Leaning in toward you shows keen interest

The People

Should you be in a meeting with more than one person, there is a group dynamics on which to keep a watchful eye.

- Glances at one another, either positive or negative tell the story of *yes* or *no* to the sale
- Disagreement among the group and with you, unless readily resolved, will eliminate the possibility of business
- Agreement among the group, and with you, allows for building the sale

The Office

As you enter someone's office, think of it as entering a home. After all, they spend many hours per day there. Find something nice to say. For example, quickly observe family pictures, evidence of a hobby, or awards posted. Comment on one for a short conversation, and then lead into the business at hand.

Obstacles

Sometimes a wrench is thrown into the best-laid plan upon meeting with a non-communicative person. However, you can still save the day by adhering to these strategies.

A long time ago, I was a assigned a particular city as a client, and one that was associated with Silicon Valley. I was excited, and anticipated having the prospective client on my resume. All of the Department Heads liked me, and what I had to offer. BUT, I needed to meet the person in charge of the budget.

Heeding the advice just laid out for you, I entered his office. It was in the basement with little sunlight. The furniture was in bad shape and nothing was hanging on the walls. It was shocking, that in a thriving city, the Purchasing Manager for the city sat in such an office.

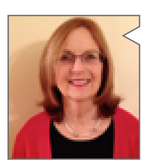
Thank goodness, as I walked past his desk, I saw one picture, and that was of a horse. Not knowing what else to say, I simply asked, "What is the name of the horse?"

That one question produced an hour-long friendly conversation. It was the gentleman's horse housed in the mid-West. His fondest desire was to retire on the form and once again be close to his horse. And my fondest desire at that moment was achieved by his agreeing to my proposal.

Bottom Line

No sales technique or strategy will ever match a heart-to-heart conversation with your clientele. And when you do this, you differentiate yourself from most everyone else in your field. Your personal achievement is that of building a formidable personal brand.

Implementing all of the above guidelines will lead you to the Smooth Sale! **SSE**



Elinor Stutz, CEO of Smooth Sale, delivers inspirational keynotes at conferences and authored two books: The International Best-Selling book, "Nice Girls DO Get the Sale: Relationship Building That Gets Results", and community service led to the writing of her second best-selling book, "HIRED! How to Use Sales Techniques to Sell Yourself On Interviews". CEO World Magazine named Stutz as one of "The brightest sales minds to follow on Twitter" while Open View Labs designated her as a Top Sales Influencer. Follow **@smoothsale**

E. Stutz YouTube Channel

Customers: Holiday Servicing

4 tips to prepare your customer service team

By Jodi Beuder

Thanksgiving is over and the busiest time of the year in retail has begun. B2C businesses and retailers often bring in 25-40% of their annual sales between Thanksgiving and Christmas. Handling this increase in volume requires planning and additional training and support for customer service teams.

Seasoned businesses have already ramped up and taken care of the essentials by hiring additional support agents and ensuring adequate server capacity, but without proper training, your business can't fully capitalize on this increase in customer interactions. There is little doubt that this time of year often frustrates customers and employees; however, if given proper tools, your customer service teams will be sure to convert potential negatives into positives. We'll look at four strategies your organization can implement to not only survive the holiday season, but also get through it with satisfied customers and happy employees.

Tip #1 – Stress

Preparing your customer service teams on what to expect during the holidays and properly training them in how to deal with demanding and stressed customers; goes a long way in ensuring positive outcomes for your customers and employees. One area that often requires additional training, especially if hiring temporary workers, is how to remain cool and calm, but not robotic when handling tense customers. When working with anxious customers who are feeling the stress of the season, training is essential for agents to learn how to best diffuse potentially hostile customers. Key points for your agents to consider when dealing with aggravated customers include: don't argue back; listen to what is being said and seek to find the quickest resolution possible; remain patient; and finally, "kill them with kindness".

Tip #2 — Cross-Train

It is not uncommon for companies to hire temporary agents during the holidays to help handle the increase in call volume. Relying on temporary agents works, as long as they are given adequate and comprehensive training. A consideration for additional staff during the holidays is to look internally and cross-train employees from all departments. Current employees of your organization are already familiar with the ethos and mission of your company, so consider cross-training them to help out during your busiest time of year! An added perk to bringing in employees across departments is that you can post-appraise the experience after the busy season. Reflecting as a group about lessons learned and implementing these findings into your on-going training gives everyone an opportunity to take ownership and engage in providing valuable feedback for improvement. Companies that cross-train during the holidays find that their customer service teams are more highly regarded when employees from other departments realize how challenging their jobs are.

Tip #3 – Self-Servicing

Another way to ease the burden on your customer service teams throughout the holiday season is to ensure that your customers can easily find answers to frequently asked questions and be able to provide self-service on your website. If customers don't need to speak with an agent to inquire about easily answerable questions, then the waiting time decreases for those customers with more pressing needs, which ultimately makes for a more satisfactory experience for both agent and customer. Agents who have worked through prior holiday seasons are one of your best resources to learn about the common questions or inquiries that customers have during the holidays, so utilize their expertise when creating self-servicing features on your website. Creating an easily identifiable "holiday specific" page to your website will help direct your customers to answers for the most commonly asked questions.

Tip #4 – Don't Forget Social Media

Social media holds sway over your business, either negative or positive. During the holiday season, it isn't uncommon for retailers to see twice the amount of social media posts regarding their company or product, so social media management can't be ignored. In a study conducted by NM Incite, it found that 71% of customers who experienced positive social care were more likely to recommend that brand to others, as compared to 19% of customers who received no response. Appropriate and timely social media responses can tie in with Tip #2 as a way to engage employees across departments when managing this important part of customer care. With simple training, and an easy-to-follow map if an inquiry needs to be re-directed, your employees from across departments can make sure your social media presence isn't understaffed during the busy season.

With some advanced planning and training, your employees can mitigate the stress and enjoy all the merriment and mirth of the season. Before you know it the holidays will be upon us, so embrace the season and keep in mind that all of these preparations will make for happier agents and customers. When all is said and done, delivering great customer care is important, no matter what the challenge or season is. **SSE**

Jodi Beuder, Customer Experience Advocate at Impact Learning Systems, believes customer service exists not just outside the company, but inside, too. With over 17 years in Marketing Executive roles, Jodi has dedicated her career to assisting companies grow their brand presence and sales, and most importantly, their customer retention and satisfaction.
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Sales Team Training

4 reasons to train them with mobile learning

By Heera Edwin

'Not seen, not heard' – an adage that aptly describes the Sales Force of any organization. Not surprising really, considering the fact that the Sales Team is almost always away from the desk. How do you train this group of people who are almost never present at the workplace? How do you provide vital information to this team who are in dire need of the latest information on the product they are selling? How do you keep your Sales Force up-to-date on the latest news, offers and other important information that they are not privy to because they are away at a remote location? How do you make them feel like a part of the organization when they are never there because they are busy selling your ware?

There is a solution. NASA is using it to walk its astronauts, engineers, and scientists through basic maintenance procedures and so are an increasing number of multinationals. And now we recommend that you use it too if you have a sales force in your organization. We are talking about the 'in' thing in learning. We are talking mobile learning.

Why do we think that mobile learning is the way to go to keep your sales force up to date and a part of the team? Because that is exactly what mobile learning does. Of all the types of learning that there are out there, only mobile learning has managed to fill in the gaping lacuna that separates the Sales Force from the rest of the organization.

And so we bring to you: **4 Reasons to Train your Sales Team with Mobile Learning.**

Consistency in Training/Learning: With your sales team scattered across a country, it is difficult – if not impossible to make sure they have the same type of training. When you want all your sales people to have access to the same information at the same time and in the same manner, mobile learning does a good job of getting this done. Small snippets of vital information are pushed to the entire team on their mobile devices, at the same time, thereby making it visible to everyone and leading to uniform training.

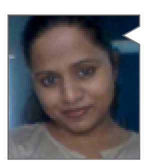
Just in time learning: If it's one person who needs to know your product thoroughly, it's your salesman. Different clients will have different questions regarding the product in question, and wrong information or lack of information on the part of your salesman can cause him to lose a deal. If he has all the information that he requires at his fingertips, he can seal a deal very quickly. With mobile learning, your salesman has all the information he requires at the flick of his mobile device. This not only boosts sales but also boosts your customer's confidence in the agility and expertise of your organization and its functioning.

Save training costs and save time: Unlike the general opinion, mobile learning is inexpensive. In fact, mobile learning is cheaper than any other method of training and can save organizations large amounts of money. Organizations can also save training time because information can be pushed to everyone at the same time. Unlike classroom training or online training that is slow and is dependent on several factors such as the availability of trainers and the availability of the entire sales force at one location at the same time – which is almost impossible on an ongoing basis, and several other factors.

Efficient: At the end of the day, what every Training Manager and Head of Sales wants is for the training that has been conducted to be efficient and lead to productivity. Mobile learning is not about pushing large amounts of texts or images through a mobile device. It's about pushing snippets of very vital information that are easy to read, easy to understand and easy to retain (memorize) – thereby leading to successful learning. And therein lies its efficiency. Apart from this, mobile learning does not assume that everyone is on the same wavelength and requires the same time and amount of information. Instead, it allows learners to decide what they want to learn and scroll to a particular section, and spend as much time as they need, on that section.

For learning to be successful, it is not important for learners to be armed with every training tool available. It is important that they are provided with access to tools and methods that will lead to successful learning – because at the end of the day, it is successful learning that will lead to heightened production and that is just what mobile learning has proved to do. **SSE**

*This article first appeared **here**.*



Heera Edwin looks at the Content Marketing initiatives at 24x7 Learning. 24x7 Learning is one of the foremost pioneers in the eLearning field.
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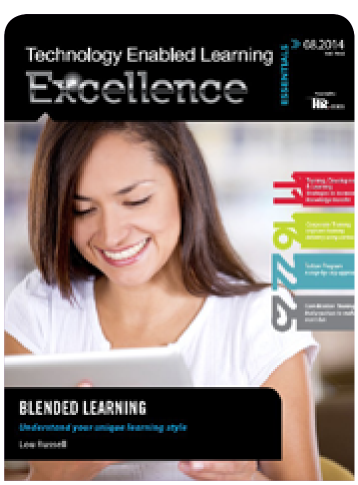

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