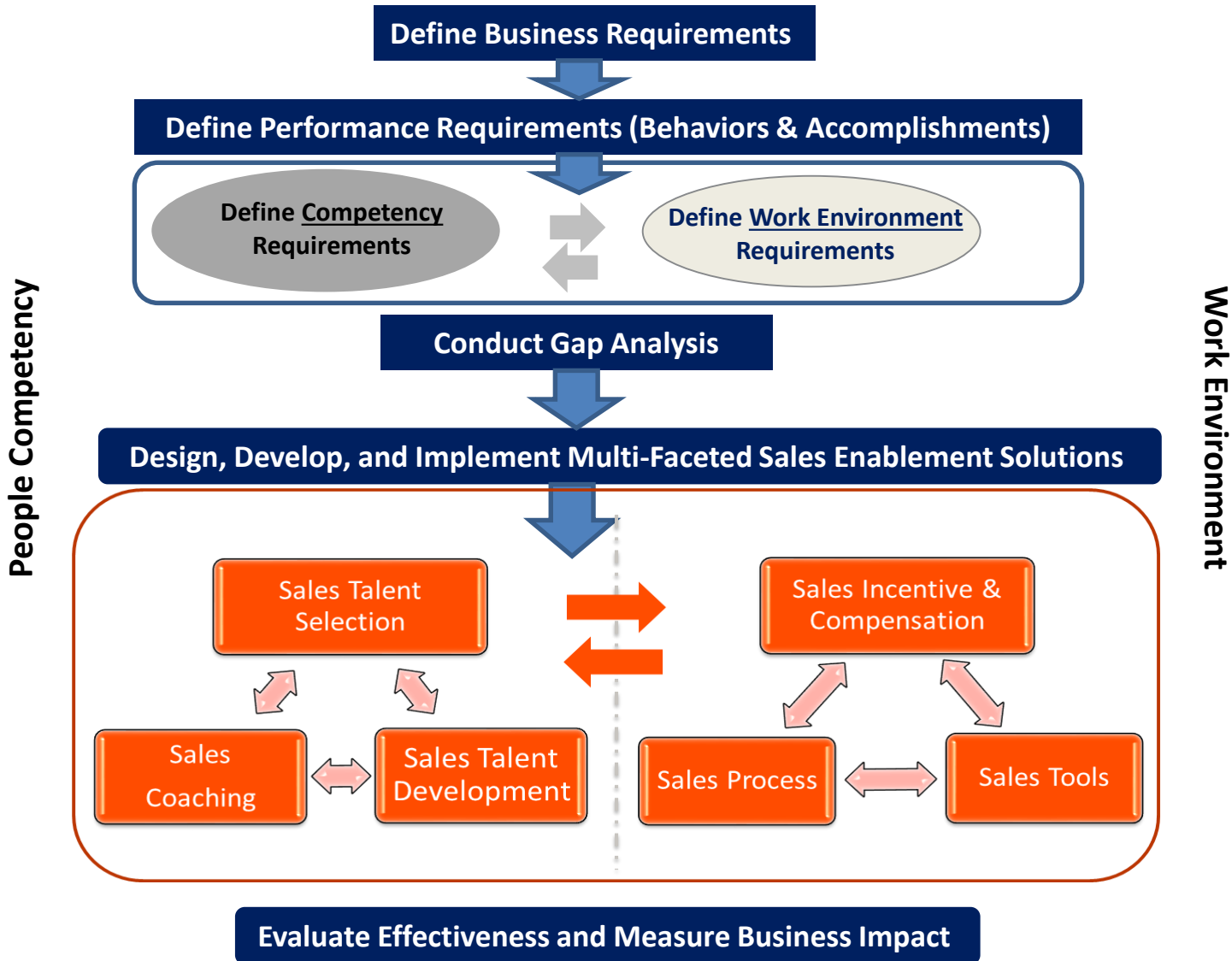# Introduction: Agenda

- Introduction *[5 minutes]*

- Sales Enablement Framework Overview *[10 minutes]*

- Identifying Business-Essential Sales Skills Using WCSCM *[10 minutes]*

- Attributes of High-Impact Sales Learning Solutions *[10 minutes]*

- Using Business-Essential Skills to Screen Sales Candidates *[10 minutes]*

- Measuring Business Impact of Sales Enablement Solutions *[10 minutes]*

- Q&A and Closure *[5 minutes]*

Introduction: Reza Sisakhti

- Reza is managing director of Productivity Dynamics, Inc., a research and consulting firm dedicated to helping clients achieve significant business results through people.

- For more than two decades, Reza has been creating competency models and measuring the business impact of talent development programs in major corporations and in public sector.

- Reza is the architect of ATD's Sales Competency Model and the author of *Success in Selling*, published by ATD in 2016.

Sales Enablement Framework

Define Business Requirements

Define Performance Requirements (Behaviors & Accomplishments)

Define Competency Requirements

Define Work Environment Requirements

Conduct Gap Analysis

Design, Develop, and Implement Multi-Faceted Sales Enablement Solutions

People Competency

Work Environment

Sales Talent Selection

Sales Incentive & Compensation

Sales Coaching

Sales Talent Development

Sales Process

Sales Tools

Evaluate Effectiveness and Measure Business Impact

Defining Business Requirements

CHALLENGES AHEAD

Challenges impacting the organization's business objectives

Behavior

Business-Aligned Behaviors required to meet these challenges

Competencies

Business-Essential Competencies that fuel the business-aligned behaviors

Defining Business Requirements

Business Analysis

Business Requirements → **Performance Requirements**
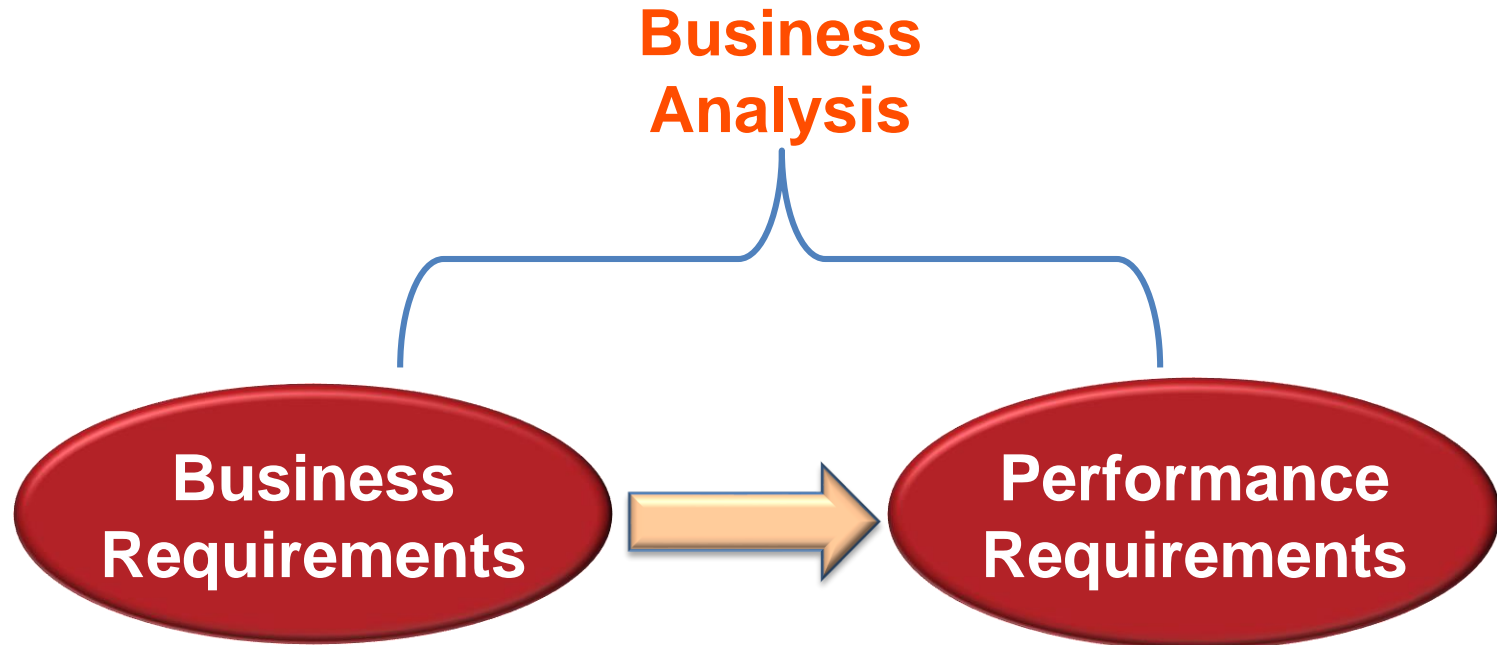
Business & Performance Requirements Defined

Requirements	Description
Business	Penetrate the installed-base market with Software as Services (SAS) and gain 10% share to offset declining revenue in traditional software as a product business
Performance	❑ **Sales Reps: Achieve 25% of sales quota by selling SAS** ❑ Business Managers: Reduce TCO for SAS by 20% ❑ Service Engineers: Complete a security audit in 2 days ❑ Delivery Managers: Reduce services delivery costs by 15%

Requirements Flow

Business Analysis

Business Requirements → **Performance Requirements**

Context Analysis

Performer Analysis → **Skill/Learning Requirements**

Work Environment Requirements
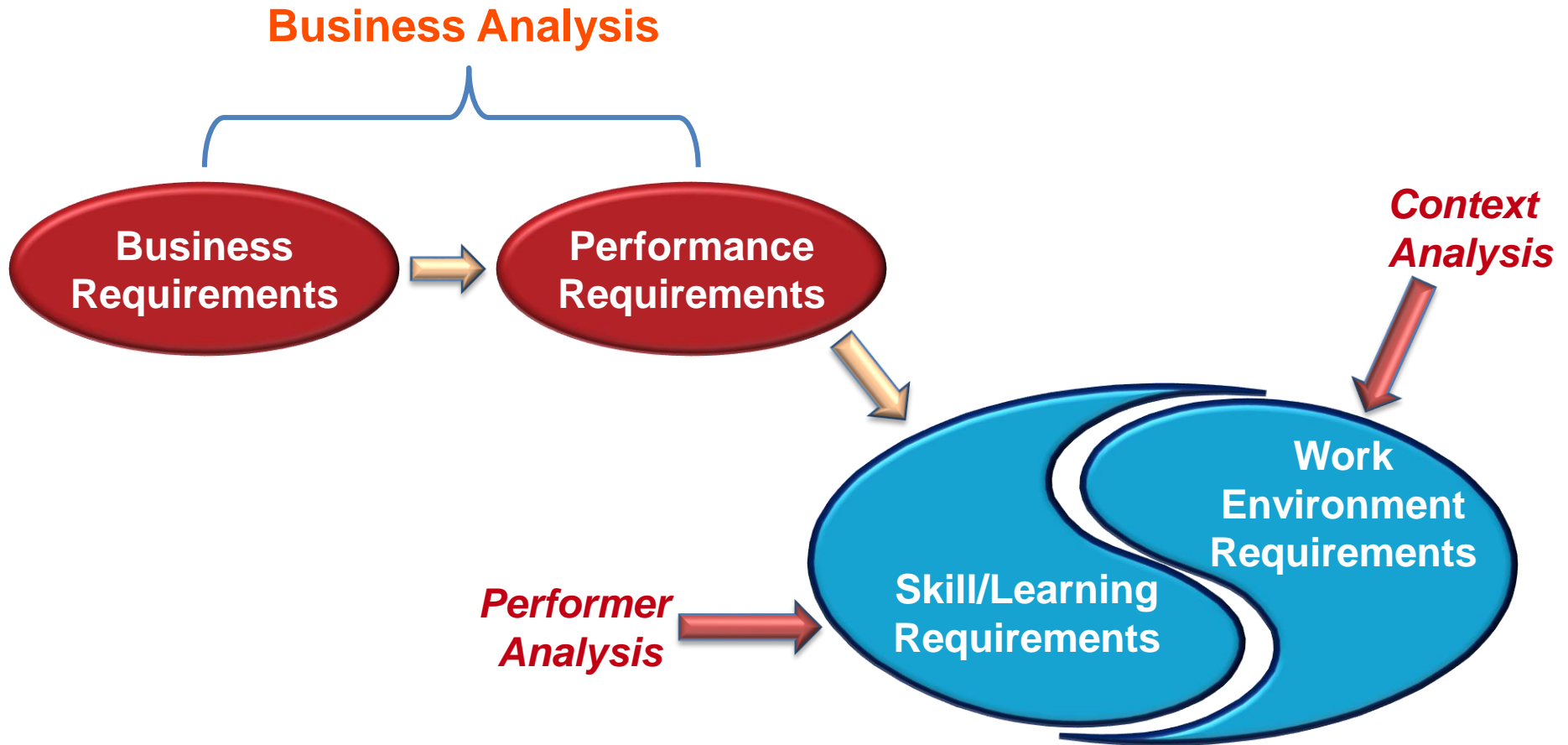
Sales Talent Requirements Identified

Requirements	Description
Business	Penetrate the installed-base market with Software as Services (SAS) and gain 10% share to offset declining revenue in traditional software as a product business
Performance	Sales Reps: Achieve 25% of sales quota by selling SAS
Competency	❑ New Account Acquisition ❑ Account Development and Retention ❑ Product/Service Acumen ❑ Competitive Intelligence ❑ Consultative Insight ❑ Sector/Industry Insight

Leveraging the WCSCM to Identify Business-Essential Competencies

Sales Force

Customer-facing, quota-carrying sales professionals

Sample Roles Covered

- sales representative:
  - account manager
  - territory manager
  - account executive
  - inside/outside sales representative
- sales specialist
- presales technical consultant
- partner/channel account manager

Sales Management & Leadership

Sample Roles Covered:
- sales executive
- sales manager
- sales specialist manager
- presales manager
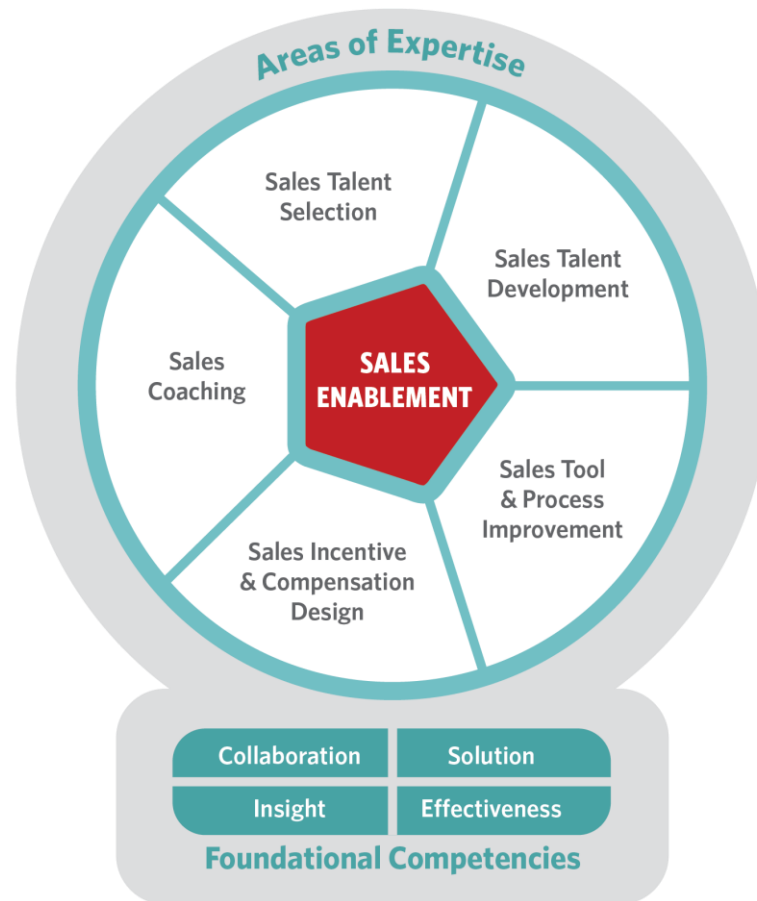- partner/channel sales manager

Sales Enablement

Sales professionals responsible for recruiting, selecting, hiring, onboarding, developing, equipping, motivating, rewarding, and retaining sales talent

Sample Roles Covered

- sales recruiter
- sales compensation planner
- sales technology specialist
- sales operations analyst
- sales trainer/coach/consultant
- sales training designer and developer
- sales researcher
- sales professor/academic
- sales enablement manager
- sales enablement executive

Areas of Expertise

Sales Talent Selection

Sales Talent Development

Sales Coaching

SALES ENABLEMENT

Sales Tool & Process Improvement

Sales Incentive & Compensation Design

Collaboration | Solution

Insight | Effectiveness

Foundational Competencies

Areas of Expertise (AOE) Components

- Title and definition

- Key knowledge & skills

- Key actions

- Sample Outputs

An AOE Example

AOE Title: **Sales Pipeline & Forecast Management**

AOE Definition: *Leverages the power of sales analytics to exploit sales opportunities and ensure achievement of business results by populating and managing the sales pipeline…*

Key Knowledge and Skills

Knowledge of:

- *Big data-enabled advances in selling*
- *CRM systems and tools*
- *Forecast report templates and requirements*

Ability to:

- *Apply relevant account planning tools, templates, and procedures*
- *Manage the size, shape, and velocity of the sales pipeline*
- *Prepare accurate and timely sales forecasts*
- *Etic.*

An AOE Example (continued)

Key Actions:

- **Harnesses CRM to achieve sales objectives** – Utilizes CRM innovations and capabilities to automate, integrate, and expedite a range of sales tasks (e.g., track and measure promotion campaigns, ….)

- **Develops and manages accurate sales pipelines** – Builds, monitors, and orchestrates sales pipelines to ensure business predictability, the identification of margin-rich opportunities, ….

- **Develops accurate sales forecasts and reports** – Develops, monitors, and communicates sales forecasts; leverages CRM capabilities to ensure accurate forecast predictability, ….

    - Etc.

An AOE Example (continued)

Sample Outputs:

- *Accurate and up-to-date pipeline report* – Including information such as size, shape, and velocity of pipelines.

- *Accurate forecasts* – Including both regular and ad hoc forecast reports.

- *Margin protection and recovery plans* – A game plan to protect margin and ensure profitability across the portfolio by focusing on margin-rich opportunities and utilizing up-sell and cross-sell techniques.

- *Sales analytic reports (trends and predictions*) – Regular and ad hoc reports to alert account team members, business sponsors, and other stakeholders on actions to be taken ….

WCSCM Foundational Competencies

Collaboration	Insight	Solution	Effectiveness
• Relationship Building	• Business & Financial Acumen	• Product / Service Acumen	• Diversity Effectiveness
• Alignment Building	• Sector / Industry Insight	• Competitive Intelligence	• Global Awareness
• Strategic Partnering	• Evaluating Customer Experiences	• Consultative Insight	• Multigenerational Effectiveness
• Teaming	• Research / Analysis	• Negotiating & Gaining Commitment	• Sales Process Acumen
• Transformational Leadership		• Complex Problem Solving	• Technology Fluency
• Customer Advocacy			• Project Management
			• Effective Communication
			• Ethical Decision Making

A Foundational Competency Example

Competency Title: Relationship Building

Definition: *Builds and nurtures positive relationships to facilitate customer satisfaction, personal effectiveness, and productive collaboration with others.*

Key Actions:

- **Actively nurtures positive relationships –** Develops and maintains positive professional relationships among stakeholders, based on personal integrity and trust.

- **Develops relationships to enhance trust and confidence** – Strives to advance collaboration within and across the organization to achieve alignment, commitment, and trust.

- **Protects the integrity of relationships** – Understands the reciprocal nature of relationships, and works with others to protect the interests of the larger organization, ….

Attributes of High-Impact Sales Talent Development Solution

Sales Audience Preferences:

- Just-in-time vs. Just-in-case
- Just for "me" vs. One size fits all
- Just "enough" vs. Covers everything

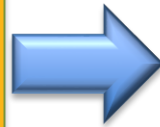| Highly Effective	Marginally Effective
Multi-faceted	Point solution
Integrated with work	Isolated
Continuous	Event driven
Adaptive	Pre-packaged
Accommodating	One size fits all
Agile	Longer time-to-learning

High-Impact Sales Talent Development Solution Components

Screening and Selecting Sales Talent

ATD
*World-Class
Sales
Competency
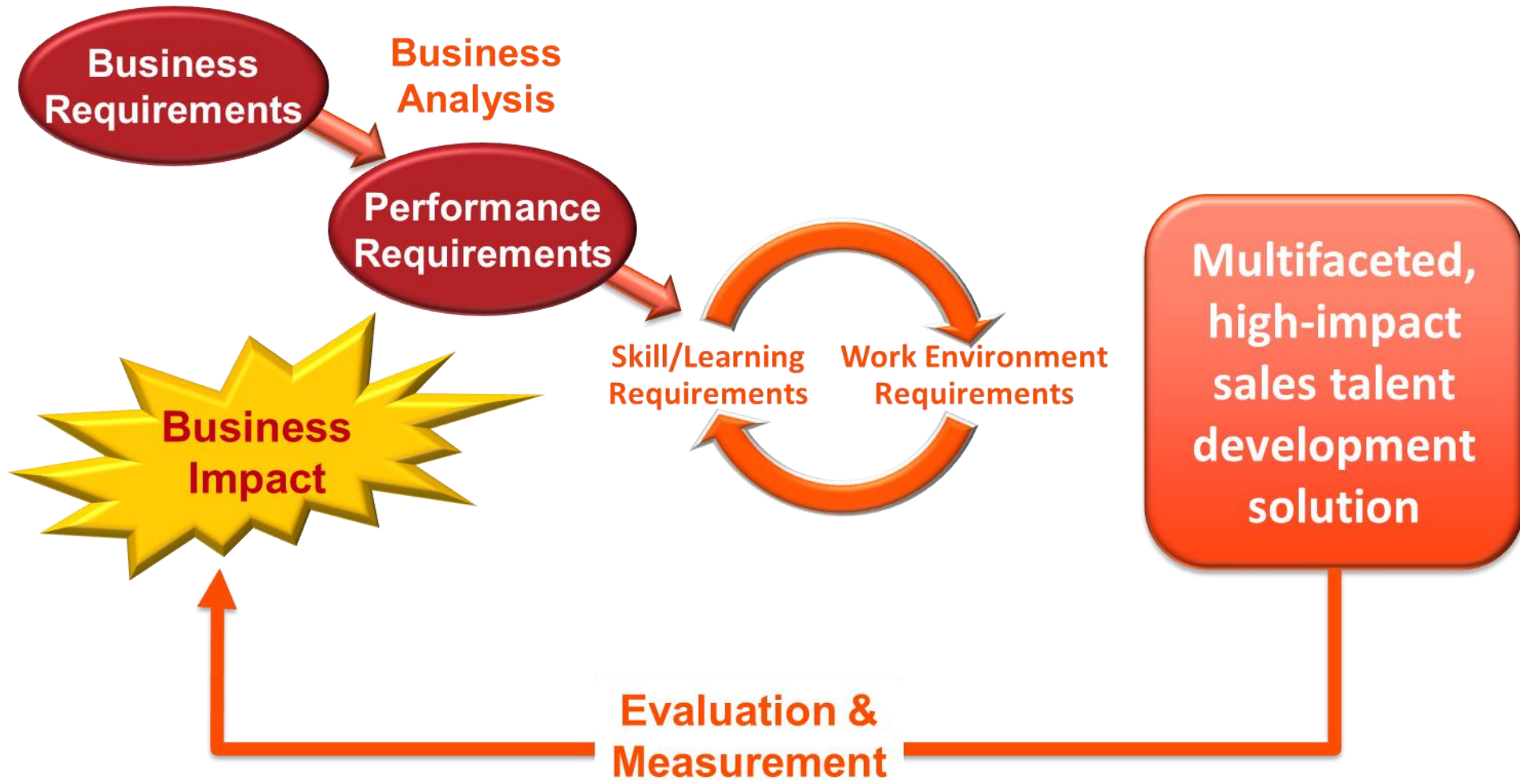Model*

→ **Hiring Guide**

A tool for assessing a candidate's business-essential sales skills during the selection process
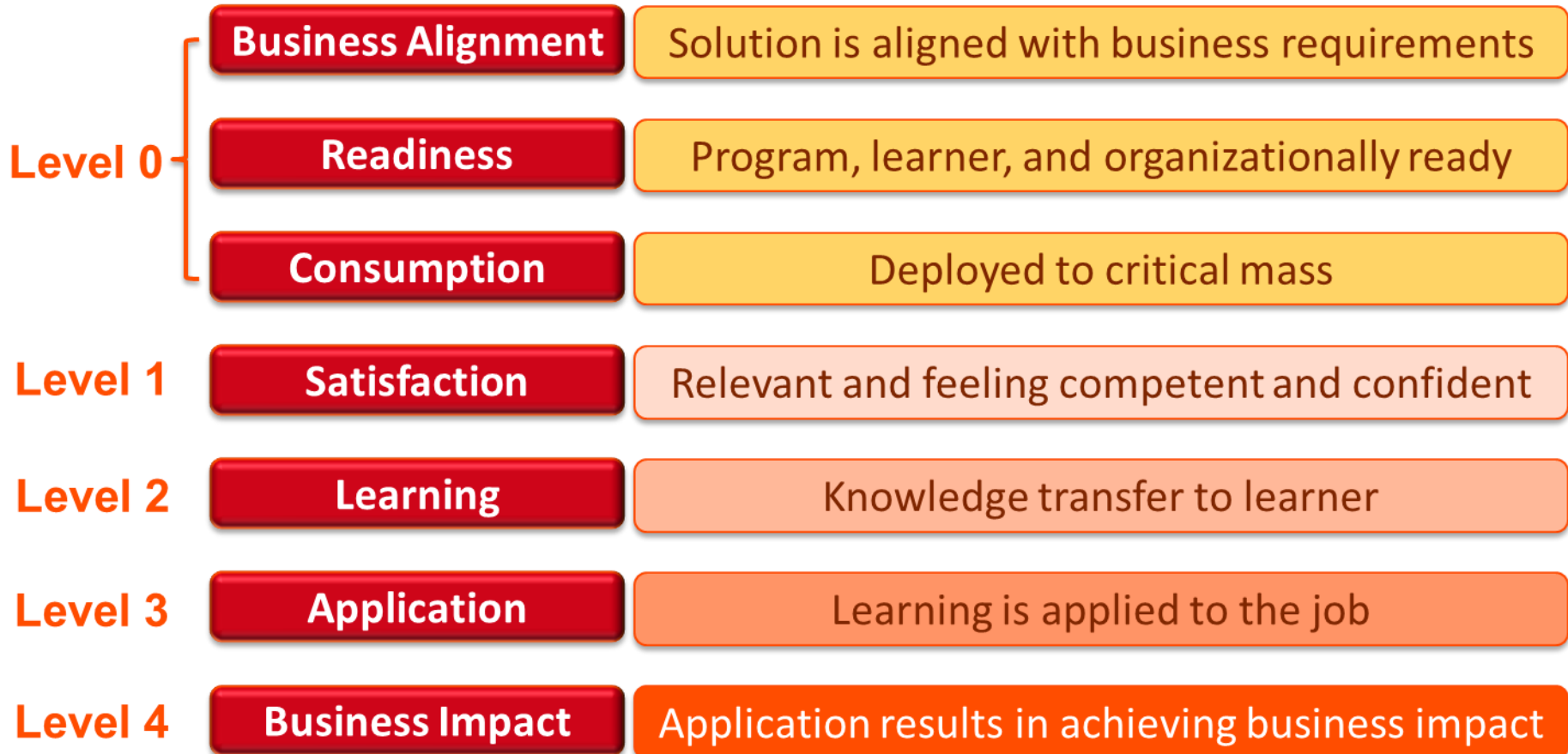
Competency-Based Hiring Guide Template

1. **New Account Acquisition –** *Pursues opportunities and acquires new accounts by identifying and qualifying opportunities; systematically researching prospects; identifying and prioritizing prospect needs; aligning value propositions with needs and KPIs of prospects; proposing and competitively positioning solutions; and negotiating and closing.*	**RATING**

Examples:	**Question(s):**
- Objection and drawbacks handling techniques - Adjust engagement tactics based on a careful reading of a prospect's receptiveness - Execute hunting and discovery efforts with persistence in the face of rejection - Prospect business and financial health information, including key performance indicators (KPI) - Lead generation and management procedures - Etc.	**Tell me about a successful call – a time when you were able to break through a prospect's initial reluctance to make a sale?** [Look for evidence of the candidates persistence and ability to "think on his/her feet" to handle objections without alienating customer, listen carefully, and adjust tactics based on an accurate reading of the customer's receptiveness.] **[ADVANCED ONLY:] Thorough research of prospective accounts is critical in any sales role. What tools and resources have you used to identify and prioritize potential customers**? [Look for use of conventional sources, social media, CRM prospect data, industry and company press releases to identify and prioritize likely prospects based on their known business needs, KPIs, challenges, urgency of purchase, authority to buy, and other relevant factors.]

NOTES/COMMENTS:

Business Impact Measurement

Business Requirements

Business Analysis

Performance Requirements

Skill/Learning Requirements   Work Environment Requirements

Business Impact

Multifaceted, high-impact sales talent development solution

Evaluation & Measurement

Measurement Framework

Level 0	**Business Alignment**	Solution is aligned with business requirements
	Readiness	Program, learner, and organizationally ready
	Consumption	Deployed to critical mass
Level 1	**Satisfaction**	Relevant and feeling competent and confident
Level 2	**Learning**	Knowledge transfer to learner
Level 3	**Application**	Learning is applied to the job
Level 4	**Business Impact**	Application results in achieving business impact

Measurement Methodology

Context Discovery & Study Planning

Consumption, Effectiveness, & Learning Assessment and Analysis

Quantitative analysis: Interviews & surveys to assess learning application & business impact cases

Quantitative analysis: Measurement of business impact

Timeline

Business Value Chain (BVC) Example

Learning Expected Learning Outcomes	Application Behavioral Changes on the Job	Business Impact Metrics Impacted by the Solution
Upon the completion of the program participants will be able to: ▪ Define and significantly enhance their short and long-term account strategy ▪ Build a business plan that links the client's key performance indicators and their associated business metrics to appropriate company solutions ▪ Define the strategy and tactics for applying the business value framework in their account plan ▪ Enhance their executive engagement and consultative selling skills ▪ Enhance their industry and business acumen	▪ Establishes longer term, strategic relationship with client ▪ Utilizes client industry knowledge to analyze client's strengths, weaknesses, opportunities and threats relative to competitors ▪ Formulates creative and long-term strategies to maximize revenue/profit for the company and addresses client's KPI ▪ Utilizes client business strategy knowledge to create opportunities that leverage company's and partners' full solution portfolio ▪ Creates and presents a compelling business case that addresses client's issues and opportunities and meet their ROI targets ▪ Increases the number of CxO or line of business executive meetings, demonstrations, invitations in client accounts ▪ Orchestrates acquisition of expert resources and the selling and delivery of business solutions across global boundaries	**Increase in revenue Metric**: Quota Attainment ▪ **In process Metric**: Increase in # of new opportunities **identified** and **closed**, especially with innovative solutions **Increase in share of wallet** Metric: Percentage of Total Available Market (TAM)

Account Managers Learning (AML) Program Business Impact Measurement

Strategic Business Objectives

- Profitable growth
- Enhanced customer relationship

The Journey

- Conducted BRD & identified business-essential sales competencies
- Conducted sales skills gap assessment
- Designed, developed, and implemented AML
- Evaluated effectiveness and measured business impact of AML

Learning Journey

Evolution of Learning

A. Pre-Work
(financial acumen assessment; self-reflection & assessment, and "smart practices" exercise")

Set 1

Set 2

1 ➔ 2 ➔ 3 ➔ 4 ➔ 5 ➔ F ➔

C. Post Summit
(check-in; community support)

Set 1: Focused on necessity of building trusted partner relationship
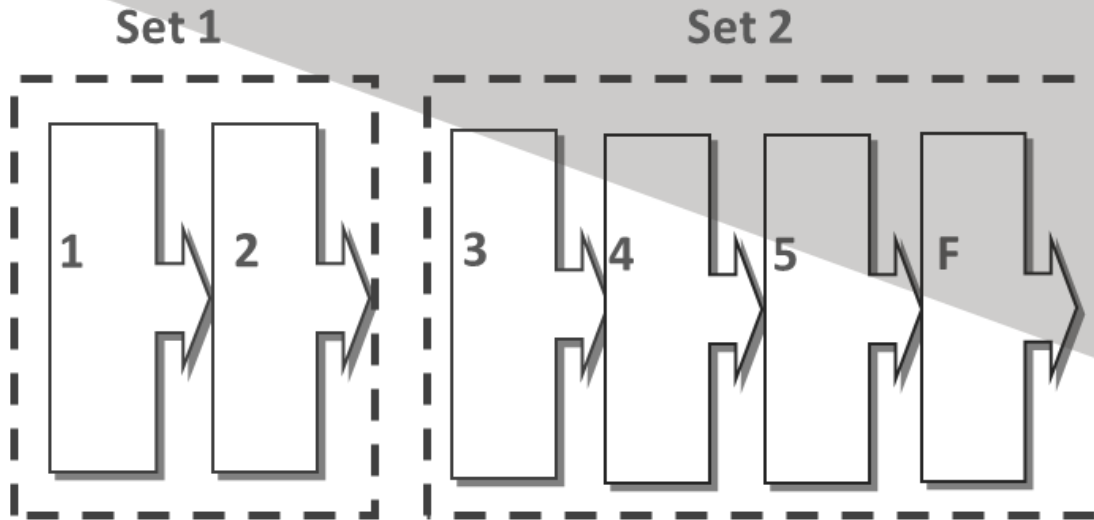
B. Learning Sequence

Set 2: provided hands-on simulation and real-world examples for acquiring new accounts and developing and retaining existing accounts.

Measurement Methodology

- **Qualitative Data**
  - Interviews

- **Quantitative Data**
  - Analysis of sales performance data

Qualitative Measurement Results

Satisfaction
- 100% -- AML was worth investment

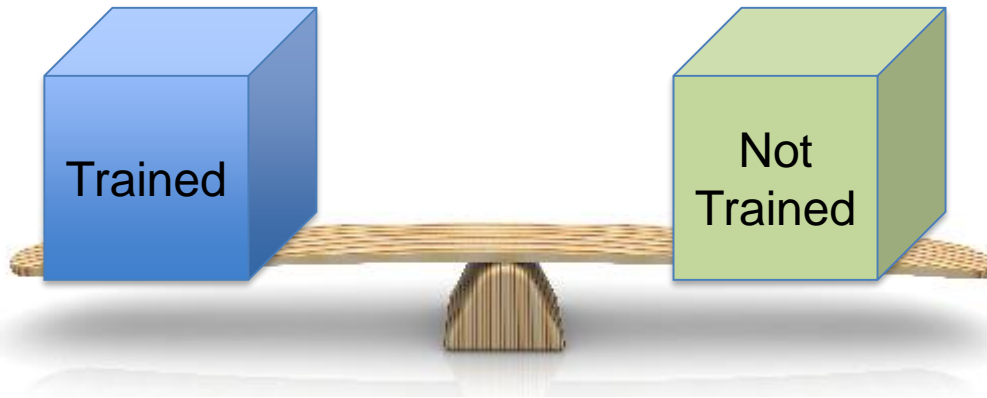**Application of Learning on-the-job**
- 88% -- Applied what they learned at AML

Qualitative Business Impact
- 81% -- Self reported positive impact
  - Enhanced sales performance and revenue
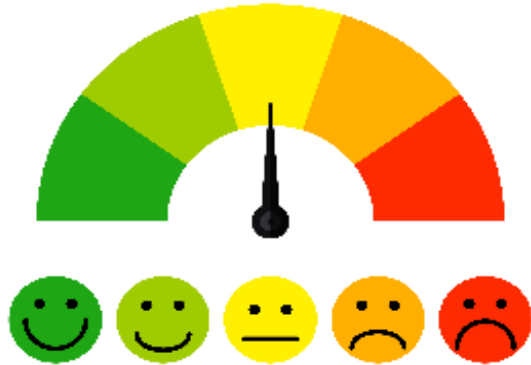 - Increased customer satisfaction
  - Improved employee morale

Quantitative Measurement Metrics

Assessing the impact on:

- Quota attainment
- Customer satisfaction
- Revenue growth
- Share of Wallet

Quantitative Measurement Metrics

- Customer Satisfaction:
  - Trusted Partner Index (TPI)

- Sales performance:
  - Quota Attainment
  - Share of Wallet
  - Revenue Growth

Customer Satisfaction

Customer Satisfaction	Not Trained Sample	Trained Sample
Trusted Partner Index (TPI)	**6.78** ⟷	**7.27**
Were the differences statistically significant?	**Yes**: (P< .05)*	

* Note: Company's TPI Goal is 7.25

- .049 Point Higher for Trained
- Trained Surpassed Company TPI Goal

Sales Performance: Quota Attainment

Sales Performance	Not Trained Sample	Trained Sample
Quota Attainment	**100.46%**	**112.07%**
Was the difference statistically significant?	**Yes**: (P< .05)	

- Quota Attainment for the Trained sample was 11.61 points higher than the Not-Trained sample

Revenue Growth and Share of Wallet

Revenue Growth		Share of Wallet	
Not Trained	**Trained**	**Not-Trained**	**Trained**
6.34%	**15.11%**	**18.73%**	**22.27%**
Was the difference significant? **Yes**: (P<.05)		Was the difference significant? **No**: (P>.05)	

For the Trained group:

- Revenue growth was 8.8 points higher
- Share of Wallet was 3.5 points higher

AML Program Measurement Conclusions

Based on the right data, collected from the right source, using the right methodology

- Improved TPI

- Enhanced quota attainment

- Enhanced year-over-year revenue growth
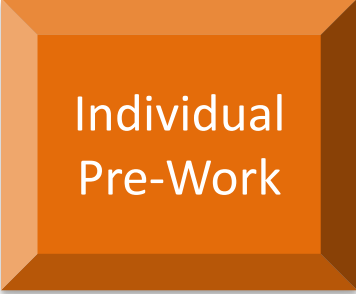
- Improved share of wallet

Q&A

ATD Sales Enablement Certificate Program Overview

Course Components

Individual Pre-Work

- Reading Assignment
  - Systems Approach to Talent Development
  - Reviewing WCSCM *Executive Summary*
- Self-Reflective Assignment

Day 1 – Morning	Day 2 – Morning
Module 1: Introducing Program & Welcoming participants	Module 4: Managing Development and Implementation
Module 2: Defining Sales Talent Development Solutions	Module 5: Selecting Sales Professionals
Day 1 – Afternoon	**Day 2 – Afternoon**
Module 3: Designing Sales Talent Development Solutions	Module 6: Evaluating and Measuring Solutions

Program Learning Objectives

Leverage WCSCM

Use customized assessment tool

Use a systems approach

Screen and select sales professionals

Evaluate solutions

Measure business impact

ATD SEC Focus

Focus of This Program

- Analysis
- Design
- Development
- Implementation
- Evaluation

ATD's SELL Conference is a 1.5-day event that will focus on learning and leadership approaches to equip you with the tools to build a fully integrated sales enablement practice.

Areas of Expertise: Sales Management / Leadership
Competencies: Sales Coaching | Sales Tools and Process Improvement | Talent Development

SELL Conference + *Sales* Enablement Certificate Bundle: **Save 10%** on both SELL 2019 and ATD's Sales Enablement Certificate when you purchase both together. The post-conference certificate program runs October 10 -11.

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