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CONVENTION 2013

Inside Sales and Service Program



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Some Background

- Things Continue to Change
 - ▶ Walk in traffic
 - ▶ Customer service roles?
 - ▶ What tasks get overlooked in your center?
- We MUST Become a Sales Organization
 - ▶ Sales are and will be the challenge
 - ▶ Service is required but with a sales focus
 - ▶ Service people are typically NOT “hunters”

The Opportunity

- Evolving our view of CSR to ISS
 - ▶ We hire “service” people that want to “serve”
 - ▶ Service tends not to sell
 - ▶ Sales people tend to naturally service
 - ▶ Creating a “sales focus” will positively impact your business
 - ▶ Sales are the lifeblood of your business

The Program!

Here's Your Book

Introducing the Kit

- Key Points

- ▶ 10 step program to “walk you through”
- ▶ NOT a “set it and forget it”
- ▶ Requires you (or someone) to manage it
- ▶ Has some flexibility
- ▶ Could be a new hire
- ▶ This is not a “telemarketing” position (a scripted, single call) but will include a lot of phone work

The 10 Steps

The Steps

- Step One - Elements
- Step Two - A Basic Sales Process
- Step Three - Compensation Plans
- Step Four - Job Description
- Step Five - Help Wanted Ad
- Step Six - Interview Questions
- Step Seven - Profile Test
- Step Eight - On Boarding Process
- Step Nine - Training
- Step Ten - Activity Management and Goal Setting

Step One - Key Elements

- The PLAN (Plan the work and work the plan)
- Hiring, training, cash flow and goals
- Hire right
- Manage them right (right from the start)
- Get your BDC or BMC involved... Let us help!

Step Two - A Basic Sales Process

- First touch, traffic control, tracking and early relationship building
- What are we hunting for?
- Establish the sales process (Weekly Activity Tracker)
- Define and manage activity
- Give them the tools
- Data collection or CRM

Step Three - Compensation

- Keep in mind that a portion of the compensation is for “service” functions
- Hourly rate + commission
- A few options:
 - ▶ Structure 1 - One set commission for all accounts
 - Assigned, hunted, walk in, etc.
 - Commission rate = 1% to 4%
 - Easier to manage

Step Three - Compensation

- Structure 2 - Hourly + Commission
- Two different commission rates
 - ▶ Normal Rate - Assigned = 1% - 3%
 - ▶ Bonus Rate - Hunted = 3% to 6% for the first 12 months
 - ▶ Harder to manage but more “self adjusting”

Step Three - Compensation

- Determine estimated revenue and sales
 - ▶ What will you need to pay in your market?
 - ▶ Will this person have other responsibilities?
 - ▶ How much time will this person spend in direct sales?
 - ▶ Get your BMC/BDC involved!
- Cash Flow Tool
 - ▶ We have developed one for you to use

Step Four - Job Description

- Create a “crystal clear” job description
- Sales focus is primary and service role as a necessary function
- Might do “extra” functions such as marketing support:
 - ▶ CDMP
 - ▶ Social media
 - ▶ Outside sales support
 - ▶ MarketingTango

Step Five - Help Wanted Ads

- The kit includes a sample
- Review and personalize
- Run ads (don't forget your own .com site)
- Look at the ad just like a marketing campaign
- Get applications and sort 'em out
- More than one source
- Timing

Step Six - Interview Questions

- Back to key elements - Hire the right one
- Look for one that “fits” you and your team
- We have many sample questions - Both sales and service related
- Interview more than once
- Check previous employers
- Background check?
- Front load your hiring efforts
- Ask your BDC/BMC for help

Step Seven - Profile Test

- Yes we have one for them also!
- Our provider for outside sales helped us develop it
Easy and quick to take
- Small fee (\$27)
- The process
 - ▶ You sign up and pay
 - ▶ They send an email link to the test
 - ▶ We get and interpret the results

Step Eight - Onboarding

- Why is it Important?
 - ▶ Helps them become productive as quickly as possible
 - ▶ Starts them out on the right track
 - ▶ Educates them on the processes, expectations, tools, resources and strategies
 - ▶ Sample training schedules are available

Step Nine - Sales Training

- We have “built” curriculum (Knowledge Hub)
 - ▶ Level 1 - Service Basics (9 webinars @ 3.8 hours)
 - ▶ Level 2 - Sales Skills (8 Webinars @ 3.6 hours)
 - ▶ Level 3 - Sales Proficiency (6 Webinars @ 4 hours)
 - ▶ You should consider sending this person to our annual Sales Forum

Step Ten - Sales Activity & Goal Setting

- Activity drives results
- Revenue generated will be directly impacted by the time spent on sales related activity
- The effectiveness of the sales activity directs where the opportunity lays
- Each activity should be a defined part of the process
- Each activity should have a goal
- The effectiveness of each step of the process points to where training can be useful

Weekly Activity Tracker

- A sample Weekly Activity Tracker has been designed for you
- Identifies key Inside Sales Activities
- Creates a measurable set of expectations
- Can be used for more direct sales management
- Exhibit B

Weekly Activity Tracker

Inside Sales - Weekly Activity Tracker											
		Week of:									
Sales Activities	Monday		Tuesday		Wednesday		Thursday		Friday		
	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	
Phone Cold Calls - Introduction	5		5		5		5		5		
Thank You Calls	5		5		5		5		5		
Inactive Account Calls	5		5		5		5		5		
Follow Up Phone Calls	2		2		2		2		2		
Satisfaction calls/"WE-WE"	2		2		2		2		2		
Marketing Collateral Material Mailed	2		2		2		2		2		
E-Mails - individual	5		5		5		5		5		
CDMP Mailer- Follow-Up Calls to Recipients	5		5		5		5		5		
Website Shares	2		2		2		2		2		
Correspondence Follow-Up	2		2		2		2		2		
Letters and Note Cards	0		0		0		0		0		
Quotes	2		2		2		2		2		
Quote Follow-Up Calls	2		2		2		2		2		
In-House	CDMP List Update										
Marketing	CDMP List Upload										
Activities	Online Ad Refresh										
	Other										
Sales Appointments For	1		1		1		1		1		
New Customers	2		2		2		2		2		

What's Next?

- Look at your operation .. do you “sell”?
- Need a new CSR? Consider ISS
- Can you add a sales person+
- Are there other roles that you know you need to handle but no one “owns” them?
- Someone needs to “own” the management of this position
- Read the kit to completely understand what is involved
- Ongoing meetings, assessment and training

What's Next?

- Can you afford to invest in this position?
- Do you have the resources?
- Start to change the culture to one of proactive selling
- Work with your BMC/BDC for personalized support

Questions?

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