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Your Sales Team's Competitive Advantage Analysis

Here are ten quick questions to ask yourself to identify potential competitive advantages or areas for improvement.

YES

- [ ] Do your customers call you to ask for strategic advice or insights?
- [ ] Are the size and frequency of your repeat purchases above industry norms?
- [ ] Do you have consistent year over year sales increases due to increasing order size or customer counts, and not the result of price increases?
- [ ] Is your profitability/ROI above industry average?
- [ ] Are you innovating in ways that benefit your customer?
- [ ] Does your sales team's understanding of the company's mission change their behavior?
- [ ] Have you protected your company/product/services with appropriate trademarks, names, etc.?
- [ ] Is it difficult for your clients to change from you to a competitor?
- [ ] Are your margins growing year over year?
- [ ] Do you know how customers find you?
- [ ] **Total number of YES**

The grading scale:

- **8 or more YES answers indicate a strong sales team.**
- **6-8 YES answers indicate your sales team needs some attention.**
- **Less than 6 YES answers indicate some work needs to be done.**

Explore The Brooks Group's suite of sales effectiveness training programs to fortify your sales team during these uncertain economic times.

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https://brooksgroup.com/sales-training-programs

Monthly Reality Check

Monthly Closed Sales versus Funnel Report

Sales Professional:	**Date:**
1. **Monthly Sales Target** Assigned sales target for the current month	
2. **Closed Business Total** Value of opportunities with aligned contracts and assigned as Closed/Won in CRM	
3. **Sales Target Gap** Monthly Sales Target - Closed Business Total	
4. **Closed Business as Percentage of Sales Target** Closed Business Total (Line 2) / Monthly Sales Target (Line 1)	
5. **Sales Funnel Total** Amount of total sales to be closed this month currently in the Apply, Convince, or Tie-It-Up Steps	
6. **Sales Funnel Percentage** Sales Funnel Total (Line 5) / Sales Target Gap (Line 3)	

Sales Plan

Results/Goal

What OBJECTIVES will help you meet your desired RESULTS?

What are your STRATEGIES for meeting your objectives?

What HIGH-GAIN ACTIVITIES will drive your objectives and results?

Weekly Virtual Sales Team Meeting Agenda Guide

This guide offers explanation for the editable meeting template that follows.

1. Introduction **5 Minutes**	• 30 seconds or less per team member • 1 personal headline (fishing trip, daughter graduation, vacation plans, etc.) • 1 professional headline (positive client meeting, positive deal progression, strong referral, client success, etc.) **Tip – Manager must tightly manage this opening to avoid ‘talkers’ exceeding the 30-second limit.**
2. Metrics Review **5 Minutes**	• Establish 5-7 weekly metrics to review • Ensure a minimum of 4 leading metrics (leading metrics measure high gain activities that drive lagging metrics. For example, “number of closed sales” is a lagging metric, whereas “number of meaningful business conversations with new accounts” or “discovery meetings scheduled for this coming week” are leading metrics.) • In this section, simply ask everyone to take a minute to review each metric. If a metric is off, determine what counter measure is necessary—and decide who is responsible for taking action. **Tip – If one individual sales person is overly concerned with any of the metrics, quickly schedule an offline meeting. This is likely a coaching opportunity.**
3. Quarterly Initiatives Check-In **5 Minutes**	• Each quarter, develop a list of high-priority initiatives intended to move your sales team towards strategic objectives and goals (Examples: trade shows, key events, new training, etc.) • Run through each quickly to see if they are progressing as expected, and if not, determine if you need to assign a specific to-do item to one or more team members.

4. Training Component **15 Minutes**	• Designate one topic or skill per sales meeting that your team can use extra reinforcement on. • Option: assign the topic to one or two of your reps that have developed best practices in that area and have them present to the rest of the team.
5. Housekeeping **5 Minutes**	• Share any policy changes, process updates, announcements, feedback for other departments, etc.
6. Win/Loss Story Sharing **15 Minutes**	• Take turns rotating through the team so that each salesperson has a week to present what they've learned through the experience of a win or loss. • You can also use this time to review key opportunities that your team is working.
7. Competitor News **5 Minutes**	• Assign 1-2 competitors to each sales person. • Ask them to use Google Alerts (or a similar technology) and their industry network to become the subject matter expert on specific competitors. • Each rep provides a 30-60 second update on their assigned competitor(s). • If no news – simply say, "No News". **Tip – To keep this section short and to the point, create the expectation that they should provide a verbal summary of their points with any detail in written form for circulation after the meeting.**
8. Closing/Action Items **5 Minutes**	• Close out the sales meeting by recapping any notable takeaways from the Win/Loss Story Sharing section. • List all any offline meetings that require scheduling. **Tip – The close should be brief and you should always be sure to end right on time.**

Weekly Virtual Sales Team Meeting Agenda Template

Date:____________________________

Start Time:______________________ Stop Time:______________________

1. **Introduction**
   5 Minutes

2. **Metrics Review**
   5 Minutes

3. **Quarterly Initiatives Check-In**
   5 Minutes

4. **Training Component**
   15 Minutes

5. **Housekeeping**
   5 Minutes

6. **Win/Loss Story Sharing**
   15 Minutes

7. **Competitor News**
   5 Minutes

8. **Closing/Action Items**
   5 Minutes

10 Steps to Account Management Success

1. **Probe key contacts to determine their receptivity to discussing the organizations' direction.** If they are receptive, do it. If they're not, work on your relationship until they are.

2. **If your key contacts don't have access to strategic plans, work with them to identify and make contact with the person or people who do.**

3. **Provide highly valuable, insightful information for your key contacts every time you meet.** Reciprocity will then make them want to do the same.

4. **Create a picture of what you can do to help the customers' organization** so that they readily see how you can help other essential stakeholders in the organization.

5. **Work hard to be the single best supplier you can be.** Be 110% dependable and earn the right to achieve preferred vendor/supplier status. Make your key contacts look good.

6. **Clarify your sales methodology/process to your customer so that he or she fully knows, understands and buys into your long-term strategy for their success.**

7. **Stress to your key contacts that you understand how to fully comply with the purchasing procedures and expectations of the customer's organization.**

8. **Always be sure to give your key contacts full credit for "finding you" and keep them in the loop with all communication related to their organization.** Make them want to "pass you around" to others whose problems you can solve.

9. **Do your best to know when to move from a sales status to a partner status.** Doing it too early is presumptuous and risky. Take your time and then be a true partner who is interested in their welfare, not just your own.

10. **Educate your customer about any impending upgrades, new product introductions, research and development plans, etc.** Allow them to anticipate how to apply your products or service in new, different ways.

13 Questions to Build Better Client Relationships

Every new prospect should be asked questions that are tailored specifically for them, but these 13 have proven to be winners—over the years and in hundreds of industries.

1. What are some of the major challenges within your business in the past 12 months?
2. What impact have these had on your profits/morale/success?
3. What, if anything, is something you would never want to see changed?
4. What do you like most about your current supplier?
5. What kind of time frame are you working within?
6. What kind of budget range do you have in mind?
7. In your search for solutions, what have you seen that has particularly appealed to you?
8. What process do you use to make this type of decision?
9. Who else, other than you, of course, is involved in this decision?
10. If you could change anything about your current situation, what would it be?
11. What is the single thing that's most important to you about this decision?
12. If we were able to solve your problem, what would this mean to your organization?
13. What would solving your problem mean to you personally?