



BTA Southeast



Your Sales Playbook



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Pros Elite Group

- **Benchmark execution experts**
- **Training offerings in:**
Sales and service management
MFP → MPS → MNS
- **Sales and service consulting supports continuous benchmark achievement of clients**
- **PIVOT software: “Automated execution excellence”**



Pros Elite Group Results

Currently engaged with 200-plus dealerships located in 82 markets in North America and internationally generating more than \$1.6 billion in annual revenue.

Our Results

- **\$130 million in increased equipment sales**
- **\$82 million in bottom-line profit improvement**
- **400,000 MPS printer devices under contract**
- **\$50 million in IT services revenues**



Five States of Office Technology Dealers

- 1. Growing organically**
- 2. Growing through acquisition**
- 3. Growing through technology**
- 4. Underperforming (less than 10% growth)**
- 5. Shrinking and being acquired**



What Separates the Growing From Underperforming & Shrinking Dealers?

- Passion for the business**
- Fact-based conversations**
- Understanding of market share**
- Humility versus pride**
- Documented sales management process (The Playbook)**



Your Sales Management Playbook

Components

- **Setting objective expectations**
- **Hiring process to secure hunters, not farmers**
- **Defined prospecting continuum**
- **Review process for RESULTS of activities**



Your Sales Management Playbook

- **Accurate valuation of pipeline**
- **Account review process**
- **Sales management development process**
- **Sustainable, profitable growth**
- **Financially driven product strategy**



Your Sales Playbook: Setting Objective Activity Expectations

- **Meet or exceed your assignment's sales quota.**
- **Make prospecting contacts daily either by phone or in-person consistent with the prospecting continuum that results in one addition to your pipeline every day.**
- **Conduct 10 net go-forward appointments each week in customers' offices.**
- **Mature 40 targeted social media contacts each week that are followed up by phone contact during the following week.**
- **Conduct four demonstrations/trials a month.**
- **Achieve 30% of all equipment sales as net new or add on business each quarter.**
- **Visit each current customer every 90 days.**
- **Ensure that managed print services is presented in 100% of proposals and demonstrations.**



Your Sales Playbook: Selling Activity RESULTS Expectation

- **One addition to the pipeline every day**
- **10 move-forward appointments a week (Initial rapport building call, account analysis, demo/trial, proposal, closing, MPS)**
- **Total pipeline dollar value in excess of \$700,000 (after 18 months)**
- **Eight current-customer cyclic visits/week**
- **100% of all deals proposed with MPS**
- **30% of equipment revenues are net-new business**



Your Sales Playbook: Number-One Selling Activity RESULTS Expectation

You will earn \$70,000 to \$100,000 each year commencing year two by maintaining a 270-day pipeline of \$700,000 to \$1,000,000-plus of closeable opportunities.



Your Sales Playbook: “Hiring Process to Secure Hunters, Not Farmers.”

Hunters: They kill your competition. They prospect, they network, they are in the field. Understand the goal is 30% net-new business at a minimum.

Farmers: They kill you! They work their base, they are in the office, they renew their equipment business at the cost of your service and supply profitability.



Your Sales Playbook: “Hiring Process to Secure Hunters, Not Farmers.”

Where Are the Hunters Hiding?

- **Some are competing against you and you should target them, but ...**
- **Colleges and universities. They are communications, sociology, psychology, business and marketing majors.**
- **They have tuition loans they need help paying. Build it into your compensation plan. (It is the investment.)**



Your Sales Playbook: “Hiring Process to Secure Hunters, Not Farmers.”

Attracting Hunters

- **Develop a scholarship program with colleges and universities to give you the first shot at the “pick of the litter.”**
- **Pay your employees finders fees equal to what you would pay headhunters. (Your employees won’t re-recruit.)**



Your Sales Playbook: “Hiring Process to Secure Hunters, Not Farmers.”

Attracting Hunters

- **Develop a mentoring/collaborative training program using your own people and reward team success.**
- **Develop a professional recruiting brochure targeted to the aggressive hunter.**



Your Sales Playbook: “Hiring Process to Secure Hunters, Not Farmers.”

Create a New Position

Digital Information Management Systems Rep:

On the front end, document and content management, and scanning. In the middle, it is technology services. At the tail end, it is optimizing fleets of digital output devices.

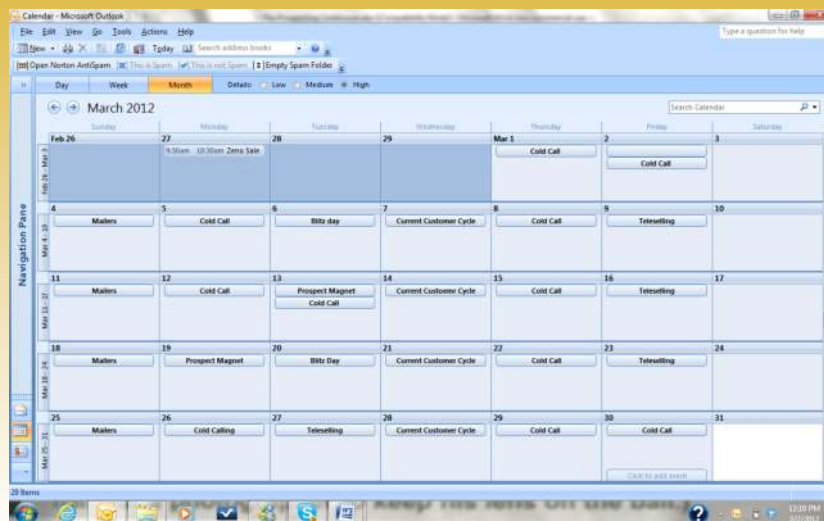


Your Sales Playbook: Develop a Thoroughly Documented Prospecting Continuum that All Sales Professionals Execute Flawlessly

- Publish a monthly calendar of those activities and execute them on that day as if it were a matter of “life or death” (because they are).
- Defines how many prospecting touches will be made in a specific time frame.
- Defines the prospecting activities (cold calling, teleselling, blitzing, current-customer cyclic visits, social marketing) that all of your sales reps will execute and exactly how they will be executed.



Your Sales Playbook: Develop a Thoroughly Documented Prospecting Continuum that All Sales Professionals Execute Flawlessly





Your Sales Playbook: Develop a Thoroughly Documented Prospecting Continuum that All Sales Professionals Execute Flawlessly

- **Touches = attempts to make contact with a suspect. Use a cold call, a telephone follow-up, an email or U.S. mail follow-up, a manager follow-up and a social marketing follow-up.**
- **Minimum number of touches on a suspect is five within 30 days.**
- **If no contact, place suspect in CRM and start process all over.**



Your Sales Playbook: Develop a Thoroughly Documented Prospecting Continuum that All Sales Professionals Execute Flawlessly

Cold Calling (A way not THE way)

- **Cold calling begins with the sales rep creating a letter and making 20 copies of the letter on the company's letterhead. The letter contains the theme for the cold-calling day.**
- **This letter always includes the name of the sales professional, their qualifications as an expert on that specific theme and how it will enable the potential prospect to either increase the prospect's revenue or grow profit.**
- **Most importantly, the letter closes with a statement of the sales professional's intent to follow up on a specific day and time range (which is the time of one of the next teleselling days) to speak with the decision maker with whom they are trying to make a MFA.**



Your Sales Playbook: Develop a Thoroughly Documented Prospecting Continuum that All Sales Professionals Execute Flawlessly

The Cold Call

“Can you help me? I am looking to leave some very important information for the individual who makes decisions on digital information management systems.”

The gatekeeper may get flustered by that opening and ask for more specifics. If that happens, the sales professional should say: “That individual will be responsible for either your scanning capability and the document management solutions that drive them, or your server maintenance and server applications (if you offer tech services) and, finally, that person is responsible for optimizing your fleet of digital output devices such as digital printing devices. Is he or she available?”

If “yes,” have first rapport meeting and close for account analysis.

If “no,” hand-write the decision maker’s name on the envelope and hand the letter to the gatekeeper.



Your Sales Playbook: The Effective Reviewing Process for RESULTS of Activity

- **Operate with a four-week side-by-side analysis to review activity results in a manageable format (one piece of paper/rep). Don’t let your CRM frustrate you.**
- **Pipeline value and activity information must be at your fingertips and extremely easy to resurrect.**
- **All reporting should be bottom up!**
- **Support reported activity with management quality call follow up.**



Your Sales Playbook: The Effective Reviewing Process for RESULTS of Activity

Create a one-page report that summarizes the following activities for four consecutive weeks:

- Pipeline additions, number and \$ value for next 270 days
- Move-forward appointments by account name, type of appointment, net new or current customer
- Current customers' cyclic visits completed
- Demos or trials completed
- Proposals issued that week
- MPS opportunities working
- Business closed that week



Your Sales Playbook: The Effective Reviewing Process for RESULTS of Activity

Activity Standard RESULTS

- One addition to the pipeline every day
- 10 move-forward appointments a week (Initial rapport-building call, account analysis, demo/trial, proposal, closing, MPS)
- Total pipeline dollar value in excess of \$700,000 (after 18 months)
- Eight current-customer cyclic visits/week
- 100% of all deals proposed with MPS
- 30% of equipment revenues are net-new business



Your Sales Playbook: The Effective Reviewing Process for RESULTS of Activity

ACTIVITY TRACKER		0000-01		0000-02		0000-03		0000-04		0000-05		0000-06		0000-07		0000-08		0000-09		0000-10		0000-11		0000-12		0000-13		0000-14		0000-15		0000-16		0000-17		0000-18		0000-19		0000-20		0000-21		0000-22		0000-23		0000-24		0000-25		0000-26		0000-27		0000-28		0000-29		0000-30		0000-31		0000-32		0000-33		0000-34		0000-35		0000-36		0000-37		0000-38		0000-39		0000-40		0000-41		0000-42		0000-43		0000-44		0000-45		0000-46		0000-47		0000-48		0000-49		0000-50		0000-51		0000-52		0000-53		0000-54		0000-55		0000-56		0000-57		0000-58		0000-59		0000-60		0000-61		0000-62		0000-63		0000-64		0000-65		0000-66		0000-67		0000-68		0000-69		0000-70		0000-71		0000-72		0000-73		0000-74		0000-75		0000-76		0000-77		0000-78		0000-79		0000-80		0000-81		0000-82		0000-83		0000-84		0000-85		0000-86		0000-87		0000-88		0000-89		0000-90		0000-91		0000-92		0000-93		0000-94		0000-95		0000-96		0000-97		0000-98		0000-99		0000-100		0000-101		0000-102		0000-103		0000-104		0000-105		0000-106		0000-107		0000-108		0000-109		0000-110		0000-111		0000-112		0000-113		0000-114		0000-115		0000-116		0000-117		0000-118		0000-119		0000-120		0000-121		0000-122		0000-123		0000-124		0000-125		0000-126		0000-127		0000-128		0000-129		0000-130		0000-131		0000-132		0000-133		0000-134		0000-135		0000-136		0000-137		0000-138		0000-139		0000-140		0000-141		0000-142		0000-143		0000-144		0000-145		0000-146		0000-147		0000-148		0000-149		0000-150		0000-151		0000-152		0000-153		0000-154		0000-155		0000-156		0000-157		0000-158		0000-159		0000-160		0000-161		0000-162		0000-163		0000-164		0000-165		0000-166		0000-167		0000-168		0000-169		0000-170		0000-171		0000-172		0000-173		0000-174		0000-175		0000-176		0000-177		0000-178		0000-179		0000-180		0000-181		0000-182		0000-183		0000-184		0000-185		0000-186		0000-187		0000-188		0000-189		0000-190		0000-191		0000-192		0000-193		0000-194		0000-195		0000-196		0000-197		0000-198		0000-199		0000-200		0000-201		0000-202		0000-203		0000-204		0000-205		0000-206		0000-207		0000-208		0000-209		0000-210		0000-211		0000-212		0000-213		0000-214		0000-215		0000-216		0000-217		0000-218		0000-219		0000-220		0000-221		0000-222		0000-223		0000-224		0000-225		0000-226		0000-227		0000-228		0000-229		0000-230		0000-231		0000-232		0000-233		0000-234		0000-235		0000-236		0000-237		0000-238		0000-239		0000-240		0000-241		0000-242		0000-243		0000-244		0000-245		0000-246		0000-247		0000-248		0000-249		0000-250		0000-251		0000-252		0000-253		0000-254		0000-255		0000-256		0000-257		0000-258		0000-259		0000-260		0000-261		0000-262		0000-263		0000-264		0000-265		0000-266		0000-267		0000-268		0000-269		0000-270		0000-271		0000-272		0000-273		0000-274		0000-275		0000-276		0000-277		0000-278		0000-279		0000-280		0000-281		0000-282		0000-283		0000-284		0000-285		0000-286		0000-287		0000-288		0000-289		0000-290		0000-291		0000-292		0000-293		0000-294		0000-295		0000-296		0000-297		0000-298		0000-299		0000-300		0000-301		0000-302		0000-303		0000-304		0000-305		0000-306		0000-307		0000-308		0000-309		0000-310		0000-311		0000-312		0000-313		0000-314		0000-315		0000-316		0000-317		0000-318		0000-319		0000-320		0000-321		0000-322		0000-323		0000-324		0000-325		0000-326		0000-327		0000-328		0000-329		0000-330		0000-331		0000-332		0000-333		0000-334		0000-335		0000-336		0000-337		0000-338		0000-339		0000-340		0000-341		0000-342		0000-343		0000-344		0000-345		0000-346		0000-347		0000-348		0000-349		0000-350		0000-351		0000-352		0000-353		0000-354		0000-355		0000-356		0000-357		0000-358		0000-359		0000-360		0000-361		0000-362		0000-363		0000-364		0000-365		0000-366		0000-367		0000-368		0000-369		0000-370		0000-371		0000-372		0000-373		0000-374		0000-375		0000-376		0000-377		0000-378		0000-379		0000-380		0000-381		0000-382		0000-383		0000-384		0000-385		0000-386		0000-387		0000-388		0000-389		0000-390		0000-391		0000-392		0000-393		0000-394		0000-395		0000-396		0000-397		0000-398		0000-399		0000-400		0000-401		0000-402		0000-403		0000-404		0000-405		0000-406		0000-407		0000-408		0000-409		0000-410		0000-411		0000-412		0000-413		0000-414		0000-415		0000-416		0000-417		0000-418		0000-419		0000-420		0000-421		0000-422		0000-423		0000-424		0000-425		0000-426		0000-427		0000-428		0000-429		0000-430		0000-431		0000-432		0000-433		0000-434		0000-435		0000-436		0000-437		0000-438		0000-439		0000-440		0000-441		0000-442		0000-443		0000-444		0000-445		0000-446		0000-447		0000-448		0000-449		0000-450		0000-451		0000-452		0000-453		0000-454		0000-455		0000-456		0000-457		0000-458		0000-459		0000-460		0000-461		0000-462		0000-463		0000-464		0000-465		0000-466		0000-467		0000-468		0000-469		0000-470		0000-471		0000-472		0000-473		0000-474		0000-475		0000-476		0000-477		0000-478		0000-479		0000-480		0000-481		0000-482		0000-483		0000-484		0000-485		0000-486		0000-487		0000-488		0000-489		0000-490		0000-491		0000-492		0000-493		0000-494		0000-495		0000-496		0000-497		0000-498		0000-499		0000-500		0000-501		0000-502		0000-503		0000-504		0000-505		0000-506		0000-507		0000-508		0000-509		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Your Sales Playbook: Accurate Valuation of Your Pipeline

- You should have an accurate one-page summary of every sales rep's pipeline.
- Pipeline input information should be audited.
- There are 13 closing steps to be taken from identification of the prospect to close. You should know how many have been done.

WHY?

- What do you do when a rep suddenly quits? How hard is it for you to assemble what they were working on?
- Have you ever heard, "The reps' pipeline was full of garbage"?



Your Sales Playbook: Accurate Valuation of Your Pipeline

Pipeline Tracking Document

480 days to 181 days 180 days to 91 days 90 days to close

Initial Call	Value Proposition	Proactive	President/VP	Lease & copy	Company print volume	Buying Team	Credit	Walk	Competing	MPS	Demo	Sales	Proposal	Install
Presented	Presented	Proposition	References of Sales	gathered	presentation identified	done	completed	criteria	established	Completed	Manager	Presented	date	Value
				Phone Call										agreement
														Sales Call

Account Name Closing Date \$ []

Date Discovered Potential



Your Sales Playbook: The Account Review Process

Account Review Outline

- **Customer satisfaction survey**
- **Notes/history of previous reviews**
- **Updates on your company**
- **Review of all assets**
- **Review of all contract-related invoices**
- **Review of service performance**
- **Update new hardware offerings**
- **Update new software**
- **Updates on tech services offerings**
- **Important documents**



Your Sales Playbook: The Account Review Process

- **Ideally conducted on a quarterly basis.**

Account Focus

- **Major accounts = 10-plus unit installations, 100-plus white-collar workers.**
- **Named accounts = >3 but <10 unit installations, or any account with any number of segment 4+ devices.**



Your Sales Playbook Master the Sales Financial Model

- **Revenue growth without profit growth is unsustainable growth.**
- **Sales organization should deliver 12% profit contribution.**
- **Manage to the sales financial benchmarks.**



Your Sales Playbook Master the Sales Financial Model

Production Benchmarks

Quota: The point where recognition and incentives kick in.

Retail/solutions rep	\$30,000/month
Named account rep	\$50,000/month
Major account rep	\$75,000/month

Minimum Standards RESULTS

The point in time where consequences kick in (and you break even).

Retail/solutions rep	\$51,000/quarter
Named account rep	\$72,000/quarter
Major account rep	\$102,000/quarter



Your Sales Playbook: Master the Sales Financial Model

Financial benchmarks that most affect sales profitability are always measured as a % of equipment gross profit.

- **Sales rep and sales supervisor compensation: 37.5% EGP**
- **Sales manager and vice president of sales compensation: 13.5% EGP**
- **All other sales expenses compensation and non-compensation (MSRs, solutions reps, pre-sales systems support, delivery, database management, sales promotions, CRM and advertising): 18.5% EGP**



Your Sales Playbook: Develop Future Sales Managers

- **Begins with hiring sales reps who are self-motivated former leaders.**
- **As sales leaders, they knew their stuff, BELIEVED THEIR STUFF and people bought their stuff.**
- **Compare all potential leaders using a “leadership matrix” for comparison.**
- **Invest in a goal-setting program. Get an understanding of their goals — personal and professional. Know their “have-tos.”**
- **Make investments in management training before they are promoted.**



Your Sales Playbook: Define Your Product Marketing Strategy

Study of 75 dealers, total revenues of \$1.1 billion, average dealer size of \$12.6 million.

- **Single-line dealers have the greatest equipment revenue growth with 71% of the dealers in the top 1/3 of the distribution. Sales reps knew their products.**
- **Dual-line dealers, with 70% or greater distribution of one product line, also have good equipment revenue growth with 70% of the dealers in the top 2/3 of the distribution.**
- **Multi-line dealers (three or more) have the lowest growth rate (more is less).**



Your Sales Playbook: Define Your Product Marketing Strategy

- **Top 1/3 saw an average of 28% equipment growth or \$1.96 million, which contributed \$235,000 profitability.**
- **Middle 1/3 saw an average of 16% equipment revenue growth or \$1.19 million, which contributed \$142,000 profitability.**
- **Bottom 1/3 saw an average of 7% equipment revenue growth or \$490,000, and contributed \$58,000 profitability.**



Your Sales Playbook: Define Your Product Marketing Strategy

Define Your MNS Offering and Stick to it!

- **Level 1 – Failure only (not preventative)**

Monitoring only with the goal of reducing mean time to resolution when there is a failure.

- **Level 2 – Preventative**

Monitoring for thresholds that lead to failures. There may be some preventative testing (i.e., test restore on backup). There is usually some scheduled preventative maintenance in this type of agreement.

- **Level 3 – Comprehensive/Proactive**

Goal is to create a proactive program that is all inclusive of Level 1 and Level 2 offerings. Provider is the most trusted advisor. Client eliminates internal IT director.



Your Sales Playbook: One Final Tip

- **Communicate the Size of your market and your market share at every meeting (Remind you and them know there is plenty of game to hunt and kill.)**
- **BEQI for hypothetical Floradise market is 2.1%**
- **Floradise total market potential size 2016:**
\$210,000,000 (2.1% X \$11.1 B)
- **Floradise company 2016 equipment sales: \$19,000,000**
- **Floradise company market share: 9.1%**



Want More?

**Advanced Sales Manager Training
2017**

Fort Myers, Florida



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