

Outbound Excellence's 2011 Coaching & Development Tools



Our Profitable
SALES GROWTH SYSTEM

- [How It All Began](#)
- [How Our System Works](#)
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- [Fees & Payment](#)
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- [Is It Right For You](#)

Outbound Excellence
 P.O. Box 424
 Maricopa, AZ 85239
 877-337-2674
 602-770-0012



Homepage

Guiding Beliefs

Secret To Our
 Success

Our Systematic
 Approach

Introduction to
 Sales Organization
 Development

How We Improve
 Profitable Sales
 Growth

First Solution
 "Free"



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Outbound Excellence

Account Management Performance Matrix

Random Audit of Installed Base of Accounts

Account		Company Name	Account Contacted In Last 30 Days?	What Products Are Being Used?	Are Products Meeting Customer's Needs?	How Are Products Being Used?	Related Products Presented	Current & Future Needs Identified	E-Mail Address	Secondary Contact?	HQ / Sub / Branch	Notes Updated	Call Back Date Set	Score
1	18765	CRX Technologies	1	0	1	0	1	1	1	1	0	1	1	80%
2	29874	James Electronics	1	0	1	0	1	0	1	1	0	0	1	60%
3	32874	Basteon Dist.	0	0	1	0	1	0	1	1	0	0	1	50%
4	16725	Clayborn Mfg.	0	1	1	0	1	0	1	1	0	0	1	60%
5	28763	Satellite Western	0	1	0	1	1	0	1	0	0	0	1	50%
6	19388	Connect First	1	1	0	1	1	1	1	0	1	0	1	80%
7	17555	ImpedX	1	0	0	0	0	1	0	0	1	1	0	40%
8	22874	Jones & Barrow	1	0	1	1	0	0	1	1	0	1	0	60%
9	32324	Ellersons	0	0	0	0	0	1	1	1	0	0	1	40%
10	15566	Tri-West	1	0	1	0	1	1	1	1	0	0	0	60%
Totals			60%	30%	60%	30%	70%	50%	90%	70%	20%	30%	70%	58%
Top Account Contact														
1	12984	IBM	1	1	1	1	0	1	1	1	0	1	1	90%
2	16573	HP	1	0	1	0	0	1	1	1	1	0	1	70%
3	19837	SUN	1	1	1	1	0	0	1	0	0	0	1	60%
4	16542	GE	1	0	0	1	1	0	1	1	0	0	1	60%
5	18998	Arrow	1	1	1	1	1	1	1	1	0	1	1	100%
Totals			100%	60%	80%	80%	40%	60%	100%	80%	20%	40%	100%	76%

Outbound Excellence Territory Management Report

Feedback Line (Below)		1	2		3				4	5	6
Date of Terr. Mgmt. Review	Sales Number	# of Accts In Assoc Book	% of Accts Profiled VIP	Review Profiled Audit	# of Accts Purchased last 90 days	% of Accts Purchased last 90 days	Review Last Contact Audit	Using Hard Copy	Using Success Planner	Review Pref. Mfg & Prod. Audit	Review E-Mail Audit
	#	250 Max Move Xtra's	Include Actual (12 mo. Report)	Discuss % Add Comnts	Include #	Include %	Discuss % Last 30 Days	Y/N Add Comm	Y/N Add Comm.	Discuss % Add Comm	Discuss % Add Comm.
2/8/2000	123	265	42%	70%	32	15%	60%	N	Y	0%	20%
Sample	1 Move 15 excess accounts to new sales associate 1.										
	2 Associate did not realize the # of non VIP profiled accounts- Development item for February										
	3 Associate uses call back screen only & feels this is adequate - Development item for Feb. -Use H/C w/ Highlight										
	4 Using Planner - Suggests putting tabs on preferred mfgs & products										
	5 Will begin asking for preferred mfg & product on each call - Development item for Feb										
	6 Will begin asking for e-mail address on each call - Development item for February										
1											
2											
3											
4											
5											
6											

Team _____ Month _____ Year _____

High Skills & Low Motivation

Management Focus

#1. Reinforce Self Worth & Importance

Motivation Tapes & Signs, Goal Setting

#2. Motivation

Food, Games, Contests, Music, Chants, Challenges

#3. Team Building

Team Name, Team Projects, Pot Luck, Team Presentations

#4. High Level of Communication

Will have many concerns, thoughts & ideas

#5. Expect & Accept ONLY Excellence!

Low Skills & Low Motivation

Management Focus

#1. High Structure & Control

Specific Directions - 100% Adherence - No Excuses!!!

A. Review Tapes & Test on Opening, Qualification & V/B

B. 210 Minutes Talk Time in 90 Min Call Blitzes

C. Daily Use of Call Tracking Report

D. Tape Daily & Review

#2. Low Support

Your Support is in Direct Correlation to Their Effort

#3. Selective Recognition

Motivate, but be careful NOT to encourage POOR PERFORMANCE

High Skills & High Motivation

Management Focus

#1. High Praise - Daily Recognition

Thank You Notes & Gifts, E-Mails, Announce Achievements

#2. Delegate Non Sales Activities

Automate Order Processing, Returns, CS

#3. Goal Setting

Personal & Professional - Teach, Motivate, Encourage

#4. ASK for Ideas, LISTEN & Implement

5. Low Direction

Pull...Don't Push!

Low Skills & High Motivation

Management Focus

#1. Master Selling Skills

Use Selling Aids: Training Tapes, Coaching, Flash Cards

2 - Call Coaching - Daily

Continuous Positive Reinforcement

Focus on only 1 area at a time until mastered

3 - Daily Taping & Review

Listen in Car in PM & Review 1st Thing in AM

4 - Master Account Management Skills

See Account Management Goals

5 - Recognize ALL Wins!!!

Sales Rep.:	Date	Start Time	End Time
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Manager: _____	Type of Call: Prospect Inactive Follow-up VM
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Review History: What is the customer's main product of interest? (If you don't know, that's question #1)

Products of Interest / Needs

What is the valid business reason for making the call?

Qualifying Questions

- 1
- 2
- 3

Potential Pain / Opportunities

- 1
- 2
- 3

Company: Contact: Type:

		N O T E S	
Ratings		Good	Needs Work
Greeting			
Correct Person			
Qualify			
Presentation			
Objection Handling			
1st Close			
2nd Close			
3rd Close			
Confirm Address			
E-Mail/Fax			
Follow-Up			

CALL SUMMARY:

Ratings: 5 Excellent - 4 Good - 3 Average - 2 Needs Work - 1 Poor

Coaching Tips!

Outbound Excellence

Prospecting - Qualifier & Profiler

Target Account - Cust. #:	Target Company Name:
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HQ Location - Cust. #:	Headquarter Name:
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Line Of Business	SIC / NAICS	Employees	Annual Sales	# of Locations
	SIC	HQ	HQ	Mfg.
URL	NAICS	Target	Target	Whse.
				Dist.

Company	1st Contact:
---------	--------------

Address:	Title:
----------	--------

E-Mail:	Phone #:
---------	----------

Need / Opportunity:

Company	2nd Contact:
---------	--------------

Address:	Title:
----------	--------

E-Mail:	Phone #:
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Need / Opportunity:

Scanners / Terminals		Printers		Media	
Model	Qty	Model	Qty	Type	
				Qty.	

Current Service Provider:	
---------------------------	--

New Product Warranty:	
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3rd Party Service Provider	
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Service Contract	Flat Rate - Basic / Comprehensive	Single Flat Rate / Coupon	On-Site
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Key Facts:

Action Items:

Outbound Excellence Goal Setting - Action Plan

Quarter: _____ *Year:* _____

Account Executive:		Date Created:	
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Goal:		Result:	
Actions:			
1			
2			
3			

Goal:		Result:	
Actions:			
1			
2			
3			

Goal:		Result:	
Actions:			
1			
2			
3			

Goal:		Result:	
Actions:			
1			
2			
3			