



Homepage

Guiding Beliefs

Secret To Our
Success

Our Systematic
Approach

Introduction to
Sales Organization
Development

How We Improve
Sales Processes

12 Steps To
Profitable Sales
Growth



About Us

History

Vision

Values

Webcasts

Testimonials



Cloud Sales Management System

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[a Presentation of the](#)

Performance Goals Strategy

Outbound Excellence - David Kalstrom - CEO - 602-770-0012
success@outboundexcellence.com - www.outboundexcellence.com



Our Profitable
Sales Growth System

- [How It All Began](#)
- [How Our System Works](#)
- [Established Performance Benchmarks](#)
- [Our Proven Sales Growth System](#)
- [12 Steps To Profitable Sales Growth](#)
- [Measurable Results](#)
- [Seamless Integration](#)
- [Portable & Scalable](#)



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Performance Goals & Action Plans

**Performance Goals & Action Plans
Are the Map & Compass of the Sales Organization**

**In Order For An Organization
To Achieve & Maintain Continuous Profitable
Sales & Customer Growth Performance**

**The Organization Must First Master
The Ability To Accurately and Effectively
Set & Achieve Increasingly Higher Levels
of Productivity, Performance
& Profitability Goals**



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Performance Goals & Action Plans

**And The Ability
To Achieve & Maintain
Increasingly Higher Levels Of Productivity,
Performance and Profitability Goals**

**Requires
The Development & Execution
Of An Effective Performance Goals Strategy.**

**5 Benefits Of Developing
An Effective Performance Goals Strategy**

- 1) Organizations That Have Proven Systems
To Effectively Set And Monitor
Accurate Performance Goals**

**Are 97% More Successful
Than Organization's Without
Effective Performance Goal Systems**



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5 Benefits Of Developing An Effective Performance Goals Strategy

2) Performance Goals Are Incredibly Motivating

**Because Their Achievement Indicates
Security, Recognition & Success**

**3) Goals Establish How Salespeople Focus
Their Time, Energy & Resources**

**4) Performance Goals Play A Vital Role
In The Success Of The Performance Monitoring
&
Compensation / Incentive Strategies**

**5) The Average Sales Organization
Could Improve The Effectiveness Of Their
Goal Setting Strategy By 40%**

The 8 Most Common - Goal Setting Mistakes

1. Sales Goals Are Developed In A Top Down Process

**2. Sales Goals Are Based On Emotion
Rather Than Facts**

**3. Sales Goals Are Made
Without The Proper Input & Buy In
From The Members Of The Sales Organization**

That Will Be Responsible For Achieving Them



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**4. Rewards Are Not Properly Aligned
With The Achievement Of Sales Goals**

**5. The Sales Organization's
Goal Setting Process Are Not Properly Aligned**

With The Enterprise's Sr. Leadership Goal Setting Process

**6. Salespeople Don't Understand
How The Achievement Of Their Individual Goals
Contributes**

To The Achievement Of The Sales Organization's Goals

**7. Lacking Proper Goal Alignment
The Energy Of The Sales & Sales Support
Organizations Are Not Focused On Improving
The Things That Matter Most ...**

**Providing Increasing Value
To The Customer & Profit To The Enterprise**

**8. Poor Goal Setting Leads To
Continuous Re-Forecasting**

**Which Erodes Credibility
And Increases Turnover**



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Achieving Organizational Excellence

**Without Accurate & Achievable
Performance Goals**

**The Members
Of Your Sales Organization
Will Waste Valuable
Time, Effort & Resources**

**Inefficiently Pursuing Activities
That Contribute Very Little
To Organizational Excellence**



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The “Shotgun” Approach

However, In Well Over 70% Of The Sales Organizations We Analyze

We See A Lack Of Shared Goals Amongst
The Sales Representatives & The Overall Sales Organization

What We See In A Typical Outbound Sales Organization

Are Individuals & Groups Of Individuals
Striking Out In Different Directions

Focusing On Their Own Individual Goals With Little Collaboration Amongst
Other Members Of Their Sales Team & The Overall Sales Organization



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Developing A Profitable Performance Goals Strategy

15 Performance Goal Requirements

- 1. Properly Aligned**
- 2. Clearly Defined**
- 3. Accurate**
- 4. Measurable**
- 5. Written**
- 6. Active Involvement**
- 7. Mutual Agreement**
- 8. Properly Perceived**

- 9. Established Timelines**
- 10. Properly Monitored**
- 11. Regularly Reviewed**
- 12. Adequately Supported**
- 13. Often Celebrated**
- 14. Rightly Rewarded**
- 15. Relentlessly Pursued**



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Goals Must Be Properly Aligned

**The Achievement Of Each Individual Sales Goal
Must Contribute To The Achievement
Of A Key Sales Organization Goal**

**The Achievement Of Each Sales Organization Goal
Must Contribute To The Achievement
Of A Key Corporate Goal**

Goals Must Be Clearly Defined

**Be Very “Specific”
About What Successful Achievement
Of Each Goal Will Look Like
&
How Performance Against Each Goal
Will Be Measured**



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High / Low - Inaccuracy Scenario

**If Performance Goals Are Too Low
You Won't Maximize The Efforts
Of Your Sales Organization**

**If Performance Goals Are Too High
Your Sales Organization Will
Become Frustrated, Lose Focus
And Actually Underachieve**



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You Can't Meet – What You Can't Measure

**Every Performance Goal
Must Be Measurable
&
There Must Be An Effective
Performance Monitoring System In Place
To Accurately Monitor Performance To
Each Goal**



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Employee Involvement Maximizes Goal Achievement

Obtaining Employee Input When Setting Performance Goals

**Not Only Shows Employees That Their Contributions
Are Recognized & Valued**

**It Also Maximizes The Probability
That The Employees Will Meet These Goals**

**Because Their Involvement In The Goal Setting Process
Instills An Added Sense Of Responsibility
For Achieving Each Goal**

Obtain Mutual Agreement

**Dictated Performance Goals
Don't Inspire The Motivation & Effort
Required To Achieve High Performance Goals**

**So Obtain Agreement On Performance Goals
So Both Parties Are Committed
To Their Achievement**

Perceiving Is Believing

**Ensure That Each Member
Of The Sales Organization
Perceives Their Goals As**

-
- **Challenging**
 - **Realistic**
 - **Achievable**
 - **Important**



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Establish Timelines

**Assign Specific Timelines
For Each Sales Goal**

&

**For Each Step Of The Action Plan
Put In Place To Achieve Each Goal**



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Establish A Follow-Up System

**Establish A Regular Follow-Up System
To Monitor Performance
&
Modify Action Plans When Necessary**



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Obtain Feedback & Agreement

**Provide Regular Feedback
On How Each Salesperson Is Performing
Against Their Agreed Upon Goals**

**After Each Follow-Up Session
Document The Feedback
& The Action Steps
Each Party Agreed To Execute**



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Provide On-Going Support

**In Addition To Follow-Up Sessions
Make It A Habit To Ask Each Salesperson
How You Can Help Them Achieve Their Goals
&
And Then Take An
Active Role In Helping Them**



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Celebrate “Small Wins”

**Acknowledge The Small Wins
Your Salespeople Achieve
In Route To Achieving Their Sales Goals**

**Acknowledgement Fuels The Fire Of Motivation
&
Leads To Greater Levels Of Achievement**



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Match Rewards With Achievement

**Develop An Effective Incentive Plan
That Will Ensure Each Member Of The Sales
Organization Will Be Sufficiently Motivated To
Overcome The Many Challenges And
Frustrations That Goal Achievement Requires**



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Achieving Goals Is Too Time Consuming

**The #1 Reason Salespeople Give
For Not Achieving Their Assigned Sales Goals Is
That They Don't Have The Available Time To
Execute The Assigned Action Steps**



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Creating Time For Achieving Goals

**If Your Salespeople Can't Find Time To Effectively
Achieve Their Assigned Performance Goals**

**Here's A Process That Will Create
All The Time They Need**

**Pick A Random Day & Spend 4 Hours Observing
Your Sales Force During Their Peak Call Periods**



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Creating Time For Achieving Goals

**What You Will Discover Is That
The Average Sales Representative
Will Spend 60% of their
“Peak” Call Time**

**Unfocused
& Inefficiency Executing
“Non-Calling” Activities ...**



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Developing A System For Converting Time Into Money

Interested In Increasing
The Profitable Sales Growth
Of Your Outbound B2B
Sales Organization?

Schedule Daily Call Blitz Periods ...



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Developing A System For Converting Time Into Money

And Then Lead Your Salespeople
To Effectively Execute
Their Daily Call Blitz Strategies

You'll Free Up
1 to 2 Hours A Day
For Executing Action Plans
& Achieving High Performance Goals



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Outbound Excellence Can Help Improve Your Performance Goals Strategy

By Answering The Following Key Performance Goal Questions:

- 1. What Sales Goals Are Most Important?**
- 2. What Are The Benchmarks For These Goals?**
- 3. What Are The Best Processes &
Formats For Measuring These Goals?**
- 4. What Are The Key Mistakes I Should Avoid
In Structuring Performance Goals?**
- 5. What Are Some Of The Most Effective Ways
For Aligning Goals Throughout The Organization?**

**6. What Are The Best Ways To Establish Effective
“Action Plans” To Ensure Goals Are Attained?**

7. How Do I Get Buy In From The Sales Team?

**8. How Can I Ensure That The Sales Team Has The
Adequate Knowledge, Skills & Resources To Effectively
Execute Their Action Plans?**



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After viewing the **Performance Goals Strategy** Section of our **Cloud Sales Management System**.
If you have any questions or would like to discuss how our New! Sales Management System can Increase your Sales Performance
Please give us a call....

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Benchmarks](#)
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Growth System](#)
- [12 Steps To Profitable
Sales Growth](#)
- [Measurable Results](#)
- [Seamless Integration](#)
- [Portable & Scalable](#)