Review of sales management infrastructure

Area	Broad description of 'ideal'	Current situation			Notes/comments (include any indication of pockets of good practice/potential roles models)
Account planning	A workable and comprehensive (but also simple) template for account planning. This should allow for/encourage a) in-depth client research/knowledge b) encouraging creativity and long term thinking and objective setting c) sharing of account plan with client and c) sharing of account plan internally to gain involvement and buy-in. Should be used actively and consistently and regularly updated	Good/ Excellent methodology for account planning in place, well regarded by sales team. High quality written account plans are produced and used consistently - this is a strength we can rely on in the programme	Good methodology/templates in place, not yet used consistently - will require reinforcement in the programme	No methodology/ unworkable methodology in place. No consistency in practice in this area, although may be some pockets of good practice. Will need to be put in place and introduced in order for the programme to work	
Account assessment framework	A simple, thorough and generally accepted framework for assessing the quality of relationship on a particular account (I.e. how close are you to being a strategic partner?). Used by the sales person to underpin account planning and long term account development. Used by sales management to underpin account allocation and segmentation, investment and resourcing	Good/ Excellent methodology in place, well regarded by sales team and used consistently - this is a strength we can rely on in the programme	Good methodology in place, not yet used consistently - will require reinforcement in the programme	No methodology/ unworkable methodology in place. No consistency in practice in this area. Will need to be put in place and introduced in order for the programme to work	
Opportunity assessment framework	A simple, thorough and generally accepted checklist or framework for assessing the strength of a particular opportunity. Used to underpin forecasting and also in account review sessions to plan sales activity	Good/ Excellent methodology in place, well regarded by sales team and used consistently - this is a strength we can rely on in the programme	Good methodology in place, not yet used consistently - will require reinforcement in the programme	No methodology/ unworkable methodology in place. No consistency in practice in this area. Will need to be put in place and introduced in order for the programme to work	
Forecasting and pipeline management	A system and process in place to record information on the short, medium and long term pipeline, which has the right level of detail and accuracy, is easy for individual sales people to use, and produces relevant and useful reports for managers. Everyone understands the importance of the system and keeps it up to date. Good culture of honesty and openness around forecasting.	Good/ Excellent forecasting and pipeline management system in place, well regarded by both managers and sales team and producing accurate and reliable information - this is a strength we can rely on in the programme	Good system in place, not yet used consistently. Forecasting accuracy may vary adn sales managers may have to spend time chasing people - will require reinforcement in the programme	No workable system in place. No consistency in practice in this area. Will need to be put in place and introduced in order for the programme to work	
Monitoring of sales performance	Reliable and constent way of monitoring actual sales performance at an individual, team, company and product/service level. Information presented in a reliable, timely, simple, useful and motivating way to senior management, sales management and sales individuals	Good/ Excellent monitoring process in place, well regarded by sales team and used consistently. Forecasts have high level of accuracy. This is a strength we can rely on in the programme	Good monitoring process in place, not yet used consistently - will require reinforcement in the programme	No monitoring process in place. No consistency in practice in this area. Will need to be put in place and introduced in order for the programme to work	
Commission structure	Commission structure which is simple, easy to understand and encourages exactly the right behaviour at all levels of the sales structure.	Good/ Excellent structure in place, which motivates and encourages the right behaviour - this is a strength we can rely on in the programme	Good structure in place, not yet fully understood, or not yet encouraging the right behaviour - will require reinforcement in the programme	Do not yet have the right commission structure in place. Is not motivating or encouraging the right behaviour in key areas. Will need to be put in place and introduced in order for the programme to work	
Team communication/ briefing	Good/regular/consistant mechanisms for updating the team and/or cascading down new guidelines or instructions - including sales force and team meetings, written communication, intranet etc. N.B Must be underpinned by strong skill and understanding of the importance of good briefing and context setting in individual managers	Good/ Excellent team communication in place, used consistently. Key messages get through to the sales team - this is a strength we can rely on in the programme	Good team communication mechanisms in place, but with patchy/inconsistent usage. Key messages don't always get through to the sales force - will require reinforcement in the programme	No team communication mechanisms in place. No consistency in practice. It is currently difficult and/or slow to get key messages through to the sales force. Will need to be put in place and introduced in order for the programme to work	
One-to-ones	Regular and effective meetings between individual sales people and sales managers to review performance, coach and develop capability	Regular and effective one-to-ones in place, well regarded by sales team and carried out consistently by all managers - this is a strength we can rely on in the programme	Some managers carry out effective one-to-ones, some don't - will require reinforcement in the programme	Importance of one-to-ones not understood. No consistency in practice in this area. Will need to be put in place and introduced in order for the programme to work	
Sales accompaniment	Sales managers regularly attending meetings with clients alongside their team to support the sales activity, and also develop the sales individual. Good pre-briefing carried out to make sure all participants are used in the best way to acheive the best result from the meeting	Sales accompaniments established as a part of the management role - done regularly by all sales managers - this is a strength we can rely on in the programme	Some managers carry out effective sales accompaniments, some don't - will require reinforcement in the programme	Sales accompaniments carried out rarely if at all. No consistency in practice in this area. Will need to be put in place and introduced in order for the programme to work	
Resourcing	Easy, clear, efficient and timely methodology for requesting and allocating resources to fulfil client requirements. Confidence in sales team that the right quality and quantity of resources will be made available to fulfil client needs	Good/ Excellent process, roles and responsibilities in place for allocating resources. This works well and is understood by all members of the sales team - this is a strength we can rely on in the programme	Resourcing a bit hit and miss and inconsistent. May be on the basis of who shouts loudest. Not always clear who to go to. - will require reinforcement in the programme	No methodology for allocating resources. Sales people may find this a difficult area. Process will need to be put in place and introduced in order for the programme to work	
Propositions	Clear, positive, easily understood propositions for the full range of product/service offerings, with clear client benefits. Confidence throughout the sales team in communicating these propositions	Clear, compelling propositions in place, well understood by sales force - this is a strength we can rely on in the programme	Clear compelling propositions in place - but not all sales force can present them with confidence - will require reinforcement in the programme	Propositions not yet clear or compelling. Sales force many vary significantly in terms of how they present what we do. Will need to be put in place and introduced in order for the programme to work	
Case studies	Clear, well-written case studies, including details of business benefits achieved, to underpin all key propositions and markets. Where no case study is available, an efficient and well understood process for gathering information and producing case studies for particular situations	A good library of up-to-date, well written case studies in place, with clear business benefits. Sales team use them consistently. Good process in place for updating case studies. - this is a strength we can rely on in the programme	Some case studies in place, not yet used consistently, or no process for regular updates - will require reinforcement in the programme	No case studies in place. No consistency in practice in this area. Will need to be put in place and introduced in order for the programme to work	
Market/ client information	Easily available, up to date and user friendly reference sources to provide information on key markets, clients and competitors	Good/ Excellent resources in place, well understood by the sales team and used consistently - this is a strength we can rely on in the programme	Good resources in place, not yet used consistently - will require reinforcement in the programme	No resources in place. No consistency in practice in this area. Will need to be put in place and introduced in order for the programme to work	
Competency/ skill assessment and performance management	Clear, comprehensive, simple and motivational checklist of skills required a) in sales people and b) in sales managers. Appraisal carried out at least 6 monthly - producing a clear development plan for each individual	Good/ Excellent competency profile in place, well regarded by sales team and well-embedded in your performance management process - this is a strength we can rely on in the programme	Good profile and performance management process in place, but inconsistent implementation - will require reinforcement in the programme	No competency profile in place. No consistency in performance management practice. Will need to be put in place and introduced in order for the programme to work	

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