Sales Management 2.0

Optimizing Sales Performance 2011 - Volume 6

By Jim Dickie & Barry Trailer

CSO Insights
Chief Sales Officer
Measuring Effectiveness

Sales Performance Optimization Topical Reports
2011 Survey of 2,000+ Firms

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CSO Insights' Sales Management 2.0 eBook
Project Overview

One of the great personal benefits of the benchmarking work we do here at CSO Insights is that we get to tap into the wealth of experiences and wisdom of numerous sales and marketing thought leaders. Because of this, we are committed to continue to publish our series of Sales Management 2.0 eBooks to share the salient knowledge and first hand experiences that our colleagues in the sales and marketing world have shared with us. In each eBook, we present a series of commentaries from the interviews we conduct where we profile the approaches that CSOs and their teams are utilizing to effectively leverage people, process, technology, and knowledge to improve sales results—even in tough economic times.

For this eBook we looked to industry leaders to provide insights into the following topics that are top of mind for many sales and marketing executives:

- **Sales Messaging:** Tim Riesterer, Chief Marketing Officer and Senior Vice President of Strategic Consulting and Products for Corporate Visions, asks a fundamental question: Are our salespeople in a position to have meaningful business-focused (as opposed to simply product-focused) conversations with customers? He then lays out a clear vision of what companies need to do to enable their sales teams to establish credibility, create a sense of urgency, and build a compelling business case to tackle their single biggest competitor—the status quo: the dreaded "No Decision."

- **Opportunity Creation:** Steve Robert, Co-Founder, Speaker, and Sales Trainer at Vorsight, focuses on all of the challenges sales and marketing organizations face today when attempting to turn suspects into prospects, and prospects into real sales opportunities. The processes, approaches, and tools that served companies well in the past are failing today. In this interview, Steve shares his views on what the optimum model is for lead generation and opportunity conversion, and how that will change the way we view these parts of the sales funnel.

- **Sales Management Development:** Our own Laura Andrus, CSO Liaison, shares her insights on what sales managers should and should not be doing. Citing new trends from CSO Insights' 2011 Sales Management Optimization Study, Laura initially highlights the key challenges facing sales teams, then addresses how the people leading our sales teams need to evolve in order to ensure that our sales forces can function effectively going forward.

- **Sales Rep Management**: Finally, Patrick Scoggin, Vice President of Worldwide Sales and Marketing for Savicom, discusses the people side of sales management. Much is being discussed about the imperative to create new processes, skills and knowledge which are required to support a "Sales 2.0" sales organization. At the end of the day, our people need to implement these new tools for progress to be made. Patrick highlights what we need to do to motivate and retain our salespeople.

Through this continuing exchange of insights, we hope to make this eBook series an ongoing, educational process for sales executives—not simply a one-time learning event. If you have suggestions for topics you would like to see covered, or if you have a story you would like to share, please contact Jim Dickie, Managing Partner at CSO Insights, at jim.dickie@csoinsights.com or phone 303-521-4410.

Mr. Tim Riesterer

Tim Riesterer is [Corporate Visions'] Chief Marketing Officer and Senior Vice President of Strategic Consulting and Products reporting to the CEO. He is responsible for leading the strategic direction of Corporate Visions' thought leadership, positioning, product development, and services delivery. Tim has more than 20 years of experience in marketing and sales. Prior to joining Corporate Visions, Tim co-founded Customer Message Management, LLC (CMM Group) where he was CEO until it was acquired by Corporate Visions in 2008. Tim was CMO and VP of Strategic Services for Ventaso, President and CEO of Brady Marketing Group and has worked in marketing, communication, and sales support for world-class technology manufacturers such as Rockwell Automation and GE Medical Systems. Tim is co-author of Customer Message Management: Increasing Marketing's Impact on Selling (Thomson/AMA) and Conversations That Win the Complex Sale (McGraw Hill) and has a degree in Mass Communications and Journalism from the University of Wisconsin-Milwaukee. Tim lives in the Milwaukee area with his wife and four daughters and enjoys singing and acting.

– Jim Dickie

A major challenge for the world of sales can be summed up in a single statement a CIO I interviewed shared with me. When discussing what he looked for from salespeople he said, "I want someone to come in here and tell me something I don't know about a problem I don't even know I have." How many salespeople today are in a position to do that effectively?

THE CONVERSATION DISCONNECT

What this CIO was pointing out was that far too often there is a disconnect between what customers *want* to talk about and what reps *can* talk about. You've probably armed salespeople with the skills to have one of two types of conversations. The first is the product data dump. Here they focus the discussion around detailed product information that may be important at a user level, more as part of an implementation discussion. But that is certainly not what executives want to talk about. They're looking to determine whether or not they even need to do something different as an organization.

The second type of conversation you may have trained salespeople to have is what I refer to as the twenty questions discussion, where the rep comes into the meeting with their discovery or assessment checklist. There are two problems with this approach. The first issue is that everyone comes in with the same 20 questions—you, competitor A, competitor B, and so one. So, you miss out on a great chance to differentiate yourself from alternative sources for your product.

Second, these executives are really busy. If you come in and expect to be educated about their business or operations, they are either going to refer you to some much lower-level person to talk with or dismiss you altogether.

Here is the reality of the situation. Because of the demands of their own organizations, they've got plenty of challenges and fires to put out. What they are looking for when somebody from the outside comes in is that they immediately demonstrate an understanding of the issues that executive is facing and then offer insights and perspectives for how they have helped other companies successfully deal with those issues.

That then gets the executive to want to open up more about his or her own organization, and now you have earned the right to ask questions, so you can, in turn, share more insights, and so on. Executives want to know about the opportunities they might be missing, or the risks that are heading their way. These are the kind of conversations they want to have, which are miles apart from the product dumps or twenty questions conversations.

DEAL CONSTRUCTION VERSUS DIALOGUE CREATION

To deliver the conversation your customer wants, you have to rethink sales training. Traditionally, sales training has been primarily about instilling a methodology into sales—either one developed internally or licensed from any one of a number of established sales skills training firms. A methodology is, in fact, absolutely necessary. There needs to be a formal process in place that helps you know how to architect a deal, who you need to talk with, what needs to happen for you to know whether you're making progress, etc.

Ensuring reps know what to do and who to talk with is essential. But at some point their (your) lips have to move to clearly differentiate yourself from the competition. Sales methodology training focuses on deal construction, not dialogue creation. These are two different skill sets, and while both are needed, one is typically neglected.

Dialogue creation can take two forms. The first is a dialogue that is centered on being responsive to what the customers are looking for. Basically, they give you a need, and you, as well as every other vendor they talk with, explains how you can deliver what they have said they want.

But if you really want to impact deals there is another approach you can take. You can go more on the offensive and bring the insight required to deliver what I call a distinct point of view. Again, let's go back to what the CIO whom I interviewed asked for: "Tell me something I don't know about a problem I didn't know I have." He is basically saying, share an insight with me. Tell me about a threat I am facing or an opportunity I am missing. When you can do that you create an opportunity to introduce your solution strengths and can clearly differentiate yourself from the competition.

THE CONVERSATION ROADMAP

To create meaningful dialogues, the first step is to identify the various "status quos" that you clearly believe you can impact. The customer has this type of equipment installed. They are currently using these types of services. They're using them for these purposes. They're investments are this old. Define the status quo and identify where there might be leaks—determine where their desired outcomes are actually at risk.

The next step is to create a picture of the new needs and requirements in order to plug these leaks or capitalize on the missed opportunities you have just identified. Then you need to link these directly to your strengths. You are literally constructing what I call a Conversation Roadmap that guides the dialogue from where the client is today to your new vision for how to achieve the desired outcomes.

At the end of this process you are in a position to articulate what's putting those outcomes at risk today. You're essentially having this conversation with your customer: "Yesterday, you were fine, your status quo was appropriate. But today, your status quo is no longer acceptable or safe. Because here's what's coming around the corner, or here's what you might be missing. Then, as a result of that, here are the new requirements that need to be fulfilled so you can once again optimize that outcome. And here are the capabilities, products, programs, and services that are needed to fulfill those new requirements and needs."

You then follow that up by sharing an example where another company, just like them, did this exact same thing that you just talked about. Connecting those dots for the customer so that they can see a clear path toward achieving their desired outcomes helps you accomplish all the things your deal construction/methodology training told you to do: create a sense of urgency, create value, differentiate yourself from the competition, etc. Companies need to actually pre-build these kinds of stories using the process just described so it flows like a good customer-focused conversation. This all requires you to instill a new discipline around your story creation process.

THE "WHY CHANGE" CHALLENGE

As you begin to think about story building you need to have the right mindset. Most of us want to build stories of *why us versus the competition*. While other vendors are an issue, the real deal spoiler is having a customer stay with the status quo. In the course of writing *Conversations That Win the Complex Sale*, I interviewed a software industry sales executive. He said that after he looked at all of their deals at the end of the sales process and did a postmortem, 80% of their losses were actually cases where the customer decided to stay with the status quo. Their final choice was to do nothing different.

When those numbers start to get that high, you have to examine why. In today's busy world, no one meets with a sales person without a good reason. If they are talking to you they have a concern. So, when *no decisions* occur they are the result of the fact that somehow along the process you were unable to convince the customer that what they were doing today was insufficient or that what you offered for tomorrow represented a significant improvement or impact over the status quo.

If you look at where most companies concentrate their efforts, the vast majority of sales training is focused on competitive differentiation: It's a "why us?" approach. In a world where the status quo is the biggest enemy, the emphasis of your messages, sales tools and training, more often, should be on "why change?" or "why any vendor" or "why do something different?"

I have seen studies that point to the fact that only about 14% of value propositions salespeople share today are viewed as either relevant or unique enough by the customer to get them to sit up, take notice, and consider really doing something to change. A lack of clear understanding about the commercial impact often leads to deals not starting or stalling. So how do you change the seller/customer interaction?

CONVERSATION-ENABLING THE SALES FORCE

To prepare your sales force to implement a conversation-focused process for selling, you need to factor in three things: development, deployment, and delivery of the dialogues. When you consider these three tasks you will often see that they are handled by three different silos within your company. Message development may be assigned to product or corporate marketing. Deployment takes place with tools being built by marketing communications, field marketing, or sales operations. And delivery is a task often assigned to sales training, corporate development, or sales ops, as well. If you don't get these areas all working together as a team, is it any wonder that you struggle to have a coherent, consistent and high quality conversation?

Development. Let's explore development first. You hear terms like "being consultative" and becoming a "trusted advisor" bandied around a lot. Well to achieve that, your posture needs to be one that may at first appear aggressive—but it is not. If you are going to be seen as an advisor, customers are going to expect you to be thought provoking. They will expect you to be challenging. They will expect you to share your company's experiences and expertise solving problems for other companies like them. Otherwise, you are just like every other vendor they are talking with.

To support reps having this kind of conversation, the messages you need to develop are insights that get customers challenging their own assumptions, concepts that help them contrast where they are with where they should be, differentiation statements that help them see you as the partner they can turn to in order to successfully make those changes.

To achieve this often means teaching your content creators new skills. I have been delivering a keynote presentation for GE as part of their Corporate Sales Forum program around the country. The intent of my session is to help people get their arms around this new way of communicating in their sales conversations. If someone wants to know more on the topic of selling with a distinct point of view they can see a summary of my keynote online, titled: Getting Your Customers to Do Something Different, Delivering a Distinct Point of View.

Deployment. Developing stories needs to be integrated with deployment. Content needs to be clearly aligned to the sales skills you have already taught and relevant to the specific tasks salespeople perform at different stages of the sales cycle. If marketing builds a really great story, but sales does not know where or how to leverage it and at which moment of truth in the selling process, then you've lost.

From our experience there are five questions you need to ask yourself about each step of the customer buying cycle as you consider sales tools deployment:

- First, what is the selling environment for each task? Is it something your rep will deliver face-to-face with a customer, on the phone, via email, etc.?
- Second, what is the objective of that task? Is it to motivate interest, differentiate your solution versus the competitive, answer a question to an objection, sell value, etc.?
- Third, what kind of dialogue do you need to convey? Specifically, what type and how much messaging are needed for each task.

- Fourth, what format should the messaging be in? Literally, what tool type is the easiest to access for sales and the preferred way for the customer to consume the information?
- Finally, what are you using today? What existing tools are your salespeople using at each step and what types of tools have they created themselves?

If you have previously matched tasks to process, you now we need to match tools to tasks. You want to make sure that the kind of tool, the amount of information and the format all match how the rep will engage the prospect. You don't want to give reps a ten pound tool to deal with a one pound task, or vice versa.

Delivery. You then need to focus on delivery. Here you want to ensure a smooth landing for your messages and tools—so they actually get used as intended. Three things need to happen to ensure your new story sticks.

First, you need to supplement your sales process and methodology skills (what to do) with conversational/delivery skills (how to do it). You need to ensure sales reps feel comfortable and confident about what to say and how to say it in a way that is significantly different than their competitors—when the time comes for their lips to start moving.

Next, delivery needs to consider situational sales training. What I mean by this is you need to be willing to package up and give to your sales reps just-in-time coaching content. They need best practice examples of how your message should be told, and how these new tools should be used in simple tiny vignettes.

Why just-in-time? Because if there's anything that we have learned over time it is that salespeople are opportunity-specific learners versus event-based learners. They learn when they have to learn, and they learn when they're at a deficit. Usually, this means they're in a situation where they require, and see a need for this content. If at that moment you make the content easily available and digestible, they will readily consume it and use it. It must be available enough, and accessible enough. Be sure to provide virtual coaching for that moment.

Finally, let's be clear that this is not a one-time event. Companies are iterating their products and services all of the time, whether by acquisition or development. Anytime there's a breakthrough, there's a chance for that to reopen your messaging point of view and challenge yourself: Did the story just get better? Do we have a new, unique strength that needs to be included? Are we now in a position to resolve another open pain that maybe we didn't deal with before? You should re-open your stories and take a look at where you can strengthen them each time you introduce a new upgrade, a new product or service, or when you acquire something.

A great source of stories is found with your customers themselves. You should always be asking your customers how they applied your offerings. What problems did you solve? What were they trying to accomplish? Instead of asking customers what did they think of the product, or a certain trademarked feature, you should continually interview your customers so they tell you the outcomes they achieved.

I see traditional customer research as often being limited by approach. It forces customers to make choices. Do you like A or B? Would you prefer to do this or that? I would much rather say, "Tell me your stories." I want to hear their words, not mine. How do they describe the pain points, what words do they use to describe the solutions? Once you get their point of view on how they accomplished their objectives using your stuff, you can then weave those experiences into the next generation of stories.

THE ROI OF GREAT CONVERSATIONS

As more companies adopt a business conversations-focused approach, they are quickly seeing what the product data dumps and twenty questions approaches are costing them. A case in point is ADP, a top business services provider. ADP is well known for constantly challenging the status quo of how they sell. In 2008, we had a chance to work with them on assessing the impact that business conversations could have on sales performance.

In this collaboration, we developed a pilot program in one of ADP's regions to see what impact a new approach to engaging customers might yield. Over a 90 day period, in addition to working active sales opportunities, we asked salespeople in that region to revisit deals that were listed as "stalled" in their salesforce.com CRM system. In that three month timeframe, 145 deals closed, and of those 115 were deals that had been stalled.

Think about this. The customer didn't change, the reps working the accounts didn't change, and the products ADP offered didn't change. Yet, 115 opportunities that had been written off as lost to the status quo were turned into closed deals, representing millions in revenues.

Here is what did change—the conversation. ADP's salespeople changed the dialogue they were having with their customers. In doing so, they reignited the stalled deals and motivated these accounts to change. We witnessed a 10X ROI for the whole program within 90 days. The program has since become an enterprise-wide strategy for ADP.

Let me share another example. Initially, Volvo Trucks came to us because they saw the need to improve their ability to differentiate and reduce the time it took deals for to close. We focused on crafting conversations that would create a sense of urgency to act, and with this, Volvo achieved a 25% reduction in the length of their sales cycle.

Another major benefit was achieved. Based on the new conversations focusing on desired customer outcomes and threats to those goals, Volvo was able to show their customers the full business value and impact of what they could do for them. In doing so, the need to rely on discounting to close deals dropped, and Volvo saw margins improve 3% to 5%. In their type of business, this is huge.

ADVICE TO MY PEERS

Having had a chance to work on this challenge with many firms across various industries, my advice to any company looking to optimize their sales performance would be to honestly assess what you are saying to your customers. Do you have a distinct point of view that is strong and compelling enough to really open the eyes of your clients and loosen the status quo? Again, the litmus test is going into your CRM records to determine how many deals that were forecast to close ended up going nowhere; how often were you beaten by no decision?

If that figure is higher than you want it to be, it is time to challenge your own status quo of selling. It is time to chuck the checklist, dump the ineffective product launch materials, and rethink the game. Do a thorough needs analysis of the challenges your customers face, match them up to ways you can facilitate meaningful change, and then document the value of achieving the new desired outcome.

You need to create context for urgency and contrast to show value. Customers need both of these to make a decision. In the absence of context, they don't know what it means to them. And in the absence of contrast between what they are doing today versus what you can help them do better tomorrow, the only item they can contrast is price.

Finally, as you deploy and deliver these new sales messages and tools to the field, make sure salespeople can apply them. Remarkable conversation and presentation skills, coupled with situational learning, supported by virtual coaching reinforcement will make this new approach to selling stick in the minds of your sales teams. Once they see the way this fundamentally changes how they are viewed by their customers, they will use it every time they have the opportunity.

Mr. Steve Richard

There may well be someone with the same amount of passion for effective prospecting, cold calling, and selling over the phone as Steve Richard, but no one could have more than he does. Steve is Co-Founder, Speaker, and Sales Trainer at Virginia-based Vorsight, a company that focuses on dealing with the challenges of getting in the right doors and starting new sales opportunities. Vorsight has been recognized by the American Association of Inside Sales Professionals as the Sales Training Company of the Year in 2010 and 2011. Prior to starting Vorsight, Steve was an Associate Director of Sales at the Corporate Executive Board. Steve is a graduate from Georgetown University. He and his wife Ellen and their daughter Katie live in Arlington, VA. In addition to his career, Steve volunteers at the Columbia Lighthouse for the Blind as a sighted person for visually impaired people. I am sure you will find the views he shared with me about how lead generation is going through a major paradigm shift useful and enlightening.

—Jim Dickie

We are all aware that close rates are coming down, and we need to do something about that. But the mistake many people are making is that they are focusing their attention on what can be done at the end of the sales cycle to win more of the deals. While this is one area for improvement, equal attention needs to be given to how to get increased, higher quality leads into the sales funnel in the first place, and more importantly, how to then convert them into real opportunities.

ARE WE BEING *SMART* REGARDING LEAD MANAGEMENT?

Lead creation and conversion are tasks that involve both sales and marketing. When I look at the lead generation efforts of most companies, it is clear that sales and marketing are working hard, but are they working smart? Let's look at the sales side of the equation.

I was recently invited into a company to look at their lead generation efforts. They had a 100+ person sales team, made up of senior professionals; $200K a year people. They had a big growth goal for the year, requiring them to close lots of new accounts. When I looked at what these reps had been doing to hit that goal, I found they were required to spend one full day a week doing cold call blitzes. That is one-fifth of all the company's selling hours consumed by lead generation being done by very well paid people. Is that really the smartest use of these people's time?

Looking at things from a marketing perspective, they have a lot of programs in place, generating a lot of names from a variety of sources—tradeshows, webinars, direct marketing, email, websites, and the list goes on. But, are those the right names? Who's the person that's dropping their card in the fishbowl at the conference? Who is the person downloading a white paper from your website? Is this someone we should actively engage, or not? To me, *more* should not be the focus—it has to be *better*.

In an attempt to ensure they are getting *better* at lead generation and conversion, some sales and marketing organizations are segmenting roles. We are starting to see job functions emerge like sales development, marketing development, or dedicated lead qualifiers, etc. The sole focus of these individuals is to take leads and to turn them into opportunities. In theory this sounds like a good move, but what happens in many cases is that their job turns into lead follow-uppers. Regardless of their lead score or how qualified these leads may be the fact is that their job, their marching orders, is to call each of these leads that come into the company.

What motivates this behavior is the 3X, 4X, 5X pipeline mentality. We get hung up on the idea that we need a certain number of leads in the funnel and so we do whatever it takes to hit that number. And, in fact, we are creating pipelines that match that target number, but at what cost?

Sales executives are increasingly frustrated with pipeline management. They look into the pipeline and see a great prospect name; let's say it's Geico, hypothetically. And, wow, we've finally got Geico in the pipeline! Looking at the call notes they seem to have a need, there might even be an RFP, it sounds promising. The problem is that your salespeople have been talking with the wrong person at Geico throughout the entire course of the process. And eventually, the deal goes black and ends up as a no decision.

When you sit back for a moment and look at how you are operating at the front end of the sales process today, it becomes clear that there is a huge cost to any company that has poor performance at this aspect of selling. To help quantify this for ourselves, Vorsight created an analysis on The True Cost of Poor Prospecting that I am happy to share with anyone who is interested. But, when you look at the numbers, they are scary.

A NEW LEAD MANAGEMENT MODEL

When we talk with sales organizations that are looking to enhance and evolve their lead generation processes, they are typically considering three methods to do so: give my existing salespeople new training and coaching, create a staff of specialists to handle tasks for the sales reps, or outsource the whole process. At Vorsight, we don't promote one method over another. The real key is to find one that works best for your firm, and often your initial reaction on what the best approach may be, may, indeed, not be the best method for you to implement.

Regardless of what approach you choose, what you need to do first is the same: you need to understand who you are engaging at the beginning of the sales process. Consider for example the Geico case we just discussed. What this shows is an instance of reactive lead management; someone raises their hand, informs your company that they exist, and you feel compelled to have to deal with each and every one of them. Well, that is not your only option.

I am an advocate of proactive lead management, which involves three main components: identify the companies you really want to do business with, map out the people with power within those accounts, and then proactively go after those specific individuals. Using this approach, we get the right accounts and people into the pipeline from day one. And to do this really effectively we need to get the right people, with the right skills, using the right methodologies, leveraging the tools to engage these accounts.

With regards to people, it would be perfect if our sales reps were great lead generators as well as closers. The reality is that your high-priced sales professionals tend have the latter skill set versus the former. Or, if they have lead generation capabilities, they had them in a different day and age. Prospecting fifteen years ago looks very different than prospecting today.

In medicine there is the triage concept, which is the process of determining the priority of patients' treatments based on the severity of their condition. The neurosurgeon doesn't do triage, it is done for them. That to me is the most effective model for sales; having someone assess prospects based on the true potential of the opportunity. And that not only requires a new person, but necessitates a blending of old and new ways of doing things.

REACTIVE/PROACTIVE LEAD MANAGEMENT 2.0

We need a new *mindset* for reactive lead management and a new *process* for proactive prospecting—starting with lead management. When an inquiry comes in from any source, my friend, Trish Bertuzzi, says it best, "Don't qualify the contact. Qualify the account!" Leads generated by marketing point us to a company that is interested in what we do, but we shouldn't assume the person submitting the inquiry is the right individual to be talking with about their company's interests. They may actually have reached out to you because of an interest from their boss's, boss's boss. That is the person I really want to talk with.

This mindset changes what you do with that lead. You need to look at that lead as a clue that something is happening. But it is just like any other clue—a statement you see in an annual report, a quote in an article in the Wall Street Journal, a news wire announcement about personnel changes, etc. Your thinking should then focus on the fact, again for sake of the previous example, that Geico is interested.

I'm not saying don't call the leads. Feel free to call the lead and get all the information that you need about what's going on in their organization. But don't stop there. Based on past successes your company has had selling this product, who are the right types of people for you to engage with if you are going to have a real chance at selling something?

After consideration, you may see that the person who submitted the lead is the right individual to work with. But, from my experience, in far more cases than not, there is someone better in that account to target. So let's go after him or her instead of feeling like we have to keep talking with the lead submitter first. Now we are moving to a new proactive process.

When I look at optimal prospecting today, the one thing that has not changed is that to be effective there has to be a live conversation. In our work we are typically setting VP-level appointments. In checking our own statistics, 76% of all the meetings scheduled are a result of directly talking with those individuals. A sale doesn't happen without a conversation—it just doesn't.

In the past, having that first live conversation used to be easier than today. I can show you that your odds of reaching someone go up significantly if you have a person's direct line, versus coming in via the company switchboard. Simply getting that number can be a challenge today, but then knowing what to say when you do get them on the phone is an even bigger issue.

PREPARING FOR THE CALL

Call preparation is an absolute must for Lead Management 2.0. Today , if you start a call using an old technique, where you ask them to tell you about themselves and their company, you'll hear a "clicking" sound on your phone very quickly. Preparation is required before you make that initial call, but it should not involve analysis paralysis. You are not asking for the order, you are asking for an appointment.

To support this task, we utilize something we call "3x3 Research", which entails taking three minutes to find three key talking points on the company and on the individual that you're actually going to talk with in that conversation.

Let's revisit our Geico example. After thinking it through, I realize the person that I want to talk with is much higher in the organization than the person submitting the lead. The challenge now becomes identifying who that person is and then coming up with a reason they would want to talk with me.

To aid in prospect identification, the emergence of sales intelligence and social networking tools can be a tremendous help in identifying the right people to call. Another great resource is switchboard operators and the administrative assistants. They can provide you with a wealth of information—if you know how to talk with them.

For instance, if you're calling the switchboard operator and you say you're looking to verify the spelling of the name of someone, it causes them to pull up their directory in front of them. Some of the systems they use are set up so they actually display the organization chart mapped out in the directory. This tells them not just who the people are, but what their titles are and who reports to whom.

THE NEW DIALOGUE

Going through the 3x3 Research process, you can arm yourself with crisp messaging that significantly increases your chances of engaging in a real dialogue. It might look something like this, "Hi Jim, my name is Steve Richard at Vorsight. I saw on LinkedIn that you previously worked at Progressive Insurance. We have done work with Paul Ryan, who I believe may have been your colleague at Progressive on new client acquisition strategies. I noticed in a recent article in Insurance Times that your CEO said that this is a priority for you. I was calling to see if we could set up a time to talk about some of the best practices we are seeing insurance firms implement to meet that objective."

How does this call approach compare to the cold calls of the past? In my proactive approach, I start by letting Jim see that I know things about him, his company and their objectives. I leveraged work we had done on a topic that should be important to him; I offered to share things that we know, versus immediately asking him to tell me things he knows. It is a fundamentally different dialogue.

Also notice that it is a dialogue with the right person. Focusing your efforts exclusively with the original lead source may lengthen the sales cycle and increase the chances of a no decision versus doing what I am advocating, which is get to the right person who can make things happen.

DEVELOPING NEW SKILLS

Skills development is always a part of getting and keeping reps productive. Most companies invest in sales process methodology training that is very good at teaching you what to do once you have a qualified opportunity. But these training methodologies presume that you have an interested party in the first place. No sales training shows you what to do to find a qualified opportunity, then demonstrates those activities live on speakerphone to model behaviors. That type of education is absolutely needed—sales reps need to get that first scheduled conversation in order for those traditional "selling skills" to be of any use later in the process.

To make what I am advocating work, we need to cultivate different skills. Social networking represents a wealth of knowledge if you know how to navigate the systems to find what you need. When we start working with new people, we spend a solid two to three hours teaching them how tools like LinkedIn work. Specifically, how to use it to find information you might not know is there, and then what to do with that information to plan for a call.

Also, as I discussed, effectively leveraging switchboard operators and administrators requires new skills. A mistake I often witness is salespeople starting to have a dialogue with these people. They start by explaining who they are, what their company does, and so on. That is a waste of your time and theirs. They aren't purchasers or evaluators of what you sell. They are holders of knowledge and information. Just focus on that and hold off on the selling until you can talk with someone who can buy.

When you get the right person on the phone, you need to quickly show them that you are worth their time to stop what they are doing and give you a few minutes of their time, which hopefully then leads to setting up a real follow-on conversation. If you are familiar with the concept of provocation-based selling, that is the basis for what needs to occur on these calls.

Buyers these days expect you to arrive on the call knowing something, to have a point of view and to challenge them on existing ideas and approaches. They are not looking for a yes-man to reiterate things they already know. They want someone to show them how similar companies are doing something better, so that they can do it, as well.

FINAL ADVICE

So my final advice to my peers is to think about this: First, I know a lot of companies are getting ready to hire more reps in anticipation of marketplace and economic improvements. That's a great strategy if you know how to get those people productive very quickly; it can be a huge resource drain if you don't. I am personally a big believer in holding off, or at least scaling down, your new rep hiring until you have a clear idea of the optimum way to find and engage the new accounts your company is going after.

With the budget you aren't using on new personnel, invest some effort in really understanding your lead conversion process. Real insights can emerge by simply taking the last 100 created opportunities that came from marketing leads and look at them through fresh eyes. What did you do with them? How many turned into opportunities? What happened to the ones that didn't? Considering the ideas I have been talking about, is there anything you could have done differently or better to improve your ROI on this part of your selling process?

Finally, look at the focus of your training. How much of what you spend is dedicated toward what I'll call the second half of the sales process and what proportion of those funds are dedicated to the first half of the sales process? It will be very eye-opening for you. If the prospecting part is getting suboptimal attention, then you shouldn't be surprised when you are getting suboptimal results.

When companies get really proficient at optimizing their performance by putting much stronger opportunities into the funnel, you then see the quality and quantity of wins coming out the other end of the funnel will increase as a direct result.

Ms. Laura Andrus

Laura Andrus has over 30 years of experience in technology sales and marketing. Prior to joining CSO Insights, Laura was founder and CEO of Sales Now!, a consulting group dedicated to assisting sales executives in gaining control over the sales process. She served as Chief Operating Officer at MobilePoint Corporation, an emerging technology company providing Tablet PC solutions for mobile sales, and Chief Operating Officer for the CSO Forum, a research and coaching firm created solely for the benefit of Chief Sales Officers. She held sales and marketing executive positions at Telebit, Infonet Services Corporation, and Comshare, Inc. Laura specializes in projects involving sales process mapping, sales manager development, sales skills development, sales rep mentoring and coaching, new product rollout, sales representative training, and channel sales. She is the co-author of Even God Can't Hit a One Iron, which focuses on mapping out the optimal selling cycle. She is a frequent speaker at sales management and marketing effectiveness conferences.

–Jim Dickie

Much has been written and discussed about how much pressure we are putting on our salespeople today. Revenue expectations are higher, competition is global, and no one can give you an answer with any confidence on where the economy is going, and so on. So yes, reps need to up their game as much as possible, but so do sales managers. The people leading our teams need to be more effective, proactive and innovative, and if they are not, companies are going to encounter big potholes on the revenue roads ahead.

THE SALES MANAGEMENT CHALLENGE

CSO Insights recently completed its annual Sales Management Optimization (SMO) study. The objective of this research effort is to gather data on over 75 sales management effectiveness metrics from companies worldwide, across industry, company size, etc. in an effort to understand the challenges facing sales managers who lead sales teams. What problems exist, and why? How can leveraging people, process, technology, and knowledge address the problems?

As soon as any major study goes out the door, my job as benchmark guru at CSO Insights starts in earnest. My focus is to sift through the data in detail, surfacing trends by industry, size of company, complexity of the sales cycle, etc. As I was building the industry benchmarks from our 2011 Sales Management Optimization study data, I was struck by the realization that if there was ever a time when being in sales management was an easy job, now is certainly not it. Consider the following:

- Win rates have sunk from over 50% five years ago to the mid 40%s in 2011, meaning sales reps are working a lot harder for every deal.

- “No decision” rates have grown from under 20% to 25% or more, which says a quarter of the sales rep’s time doesn’t pay off at all.

- For 2011, over 90% of companies have raised revenue targets—many over 25%, which will require even more sales rep effort.

- Two-thirds of companies are increasing head count—half of those by over 10%. This burden is on sales managers who have to get the reps on board and ramp them up. In addition, your competitors are trying to steal your top performers.

- Almost 60% of companies need over six months to ramp up new sales reps. Many industries will not get the reps up to speed before 2012.

We often joke about "Maalox moments" in sales, and this is clearly that time for the managers leading sales teams. How are they going to meet ever increasing expectations? The pressure on sales management to make their revenue targets for 2011 a reality is tremendous. They have to help reps increase the win rate, qualify out the non-buyers earlier to lower the "no decision" rate, and hit higher revenue targets. When they're not doing that, they have to hire more reps, ensuring they are picking only those who have a high potential to be successful, and then ramp them up to full productivity faster than ever.

As the Chief Sales Officer (CSO), all of this means you had better have a great management team, or you could be in for a nasty revenue surprise.

WHAT DOES IT TAKE TO BE A GREAT SALES MANAGER TODAY?

Everybody knows a good sales rep does not always make a good sales manager. When I started as a sales manager, the best practice people pushed was Management by Walking Around (MBWA). It's still a good principle, although harder to follow with our virtual sales forces spread far and wide.

I practiced MBWA religiously. One morning I stopped at the front desk to pick up a message from my boss that read, "Redo budget. Reduce by 25%." I went straight to my office and shut the door, preparing for a challenging phone call with the boss. When I came out an hour later, all of my staff were standing outside my office. "Are you OK?" "What's going on?" "Tell us now!"

I usually stopped to check on each of them on my way down the hall. I had broken my routine. They knew something was up, and it wasn't good. Lesson learned. I never did that again, and I discovered how important those morning conversations were to them.

Parenthood was my best preparation for sales management. You teach your kids what to do to be successful, cultivate their strengths, give them lots of love, and hand out scathing criticism when they screw up. It's exactly the same with sales reps.

No, you don't need to be a parent to manage a sales organization. But what does it take, and what should organizations look for when hiring managers?

Primary sources of sales managers named by the participants in our survey are:

- Successful sales reps from within the company (36%)
- Experienced managers from within the industry (37%)
- Experienced managers from outside the industry (18%)
- Experienced managers within the company, but no previous experience in sales (8%)

Surprisingly, we didn't detect significant differences in results among these groups. The key is to identify the characteristics that make a person a good manager. In our Sales Management 2.0 eBook, Volume 3, there is an article about ADP's hiring formulas. They look for different qualities in managers than they do for sales reps.

My first company calibrated management characteristics by testing all of the incumbent sales managers. Some of the qualities we came up with were empathy (the ability to read people and easily relate to them), intelligence, and the ability to pay attention to detail (Ugh!). We flagged these characteristics in our pre-employment assessment testing and came up with a great group of new sales managers.

The qualities you need for your markets may be different. Look to the assessment testing people to help you come up with the right characteristics to look for.

A sales manager has to be a great coach, building a successful team that pulls together. The manager must be an evangelist, selling the benefits of the sales process, the channel strategy, the CRM system, the customer service policies throughout the organization, etc. If your managers don't do this, the thousands of dollars you spent developing the processes will be wasted. And it doesn't hurt if the sales manager is a caring parent-type, praising those at the head of the pack and admonishing slackers.

WE DON'T KNOW WHAT WE WERE NOT TAUGHT

Unfortunately, humans are not born with instincts like hunting dogs. We're empty slates until somebody teaches us how to do things. And then without reinforcement we frequently don't follow their advice! If you have people with great potential for management, how do you develop them into great managers?

The benchmarking part of me looks at management training expenditures as a first test of how companies are handling their management raw material. Would it surprise you to learn that the companies spending the least on management training have the lowest win rates? Or that, as management training expenditures go up, so do win rates? If you need the data to persuade your company to spend more on management training, call me at 716-213-3562 or email laura.andrus@csoinsights.com.

What I also found interesting was the various types of training best-in-class companies are providing their sales teams. Beyond sales process skills, they are focusing on coaching and mentoring, business acumen for the markets they sell into, negotiations, CRM utilization, territory design, and forecast management (and with 44% win rates, most companies could use more of this).

The study results make a compelling case for the need to invest in a variety of skills training for sales managers. Give it to them and they become great sales leaders; withhold it, and they revert back to what they know and try to close the deals themselves, which does not benefit the company over the long haul.

KNOWING WHEN TO ACT

Remember the attention to detail part in our assessment tests? My test results said, "Laura is capable of paying attention to detail. But she doesn't like it." It turns out if your managers are going to manage their reps and their pipelines, they need information. So what tools are companies providing to sales managers so they can get information?

In 2011, almost a third of companies in our survey are still using spreadsheets. Still! So much for the fast pace of technology. Spreadsheets aren't going to do it today!

Then there are the 55% who use their CRM system to manage forecasts. CRM systems are opportunity managers, not pipeline managers. A CRM report will tell a sales manager there are $60M in the forecast this month. In a quarter, the manager will see around $60M again. But the manager has no idea which accounts fell out, which are new, or which sales reps are doing the most shifting. So the manager has no idea where to take action. The CRM system doesn't go far enough. Your sales manager is going to have to work all weekend to figure out what's up.

The study data found that a mere 10% of the companies in the survey have adopted sales analytics. These systems tell sales managers precisely what's needed to work with the sales reps: what deals fell out, where probability ratings or dollar amounts changed, which deals forecast to close are too early in the sales process to close this quarter, which sales reps need help.

PROACTIVE SALES MANAGEMENT

If your managers have the right analytics tools they can practice proactive sales management. This is important because the reps to manager ratios are increasing. They were 6 to 1 last year. They're 6.45 to 1 this year. With all of the hiring that's happening, the ratio will be 7 or 8 to 1 by 2012. Sales managers need to use their time more wisely. That might mean spending two days with one rep and only touching base with the five reps whose pipelines are healthy. Sales managers can't do this without technology to help them find the details that need their attention.

A longtime friend of CSO Insights is Roger McKee. Years ago, when Roger took over running a division of Xerox, we asked him how many salespeople he had working for him. He smiled slightly and said, “Oh, about half of them—but the rest will be working for me real soon or they’ll be working somewhere else.”

Roger is a big believer in process. His goal is to have his sales organizations doing one thing “n” times, versus “n” things one time. By having everyone follow the same sales process, Roger is able to quickly detect the flaws in the sales strategies and make changes as the marketplace demands.

This attitude is critical if you expect to reengineer sales. If you have 100 sales reps doing 100 different things, it will be impossible for your sales managers to apply technology in a meaningful way. You have to make it clear to the sales organization through their evangelist managers that once the sales process is defined, everyone will need to follow it or leave.

Being a sales manager is a tough balancing act. If you can develop your sales managers into good coaches, evangelists, and disciplinarians, your team will be in position to meet the challenges your company faces going forward. This means enabling them to be effective managers and providing them with the tools that will help them focus their efforts where they’re needed.

In sports, you see examples where coaching makes a huge difference in performance. When you have a visionary head coach who surrounds him or herself with competent assistant coaches, you find that the players live up to, if not exceed, their potential. In today’s environment, that is what is needed in sales. We need ordinary sales reps to achieve extraordinary things, and if they get access to the right coaches, they can.

Mr. Patrick B. Scoggin

When I think of sales professionals who have been successful at all levels of their sales career—from starting out as a rep to being a chief sales executive—Patrick Scoggin's name always comes to mind. Patrick is currently Vice President of Worldwide Sales and Marketing for Savicom, where he joined in October 2001 after almost 30 years of high technology, sales, and executive management experience. His responsibilities include overseeing the company's direct sales and marketing operations and heading up customer service. Prior to coming to Savicom, Patrick held executive and senior management positions with SmartLynx, Mentor Graphics, Logic Vision, Sunrise Test Systems, Crosscheck Technology, and Teradyne. While there is a great deal of talk about the need for new Sales 2.0 models—which Patrick advocates embracing—he also makes a strong case for why some tried and true sales management concepts need to be carried forward to have optimal sales teams.

—Jim Dickie

I appreciate that there are many things that we did in sales in the past that won't work in the future, and we should be open to new strategies and tactics. But there is one thing we did that we seem to have gotten away from today—taking care of our people.

PEOPLE AS A CRITICAL SUCCESS FACTOR

Today, we have more pressure on our organizations to increase sales and profits than ever before, and over the past couple of years we have had to do it with a lower headcount. The only way we have been successful is by getting more of a contribution out of the people we have. I don't think that's going to happen going forward unless we go back to the strategies we previously used to build the sales teams.

When I look back, the highest performing companies that I have been associated with were ones that were very employee-oriented. The preeminent example for me personally was Itel. I look back and I think, "Well, what made them such a great place to work?" We all worked ourselves to death, seven days a week, we were under a lot of stress, but we loved it.

The key factor for me was that the management team took very good care of the people. We had a very low turnover rate, and we attracted some of the best people in the industry. The reason was that the president on down to the company administrators made sure that the employees were taken care of. We were paid reasonably well, but that really wasn't the issue. We had a reasonable benefit plan, but no different than you would have at any other firm. It was more of a sense, on the part of everyone that worked there, that the company cared about us and valued what we did for the company.

There was one major activity that created that sense of family: the company went out of its way to keep everyone informed. There were regular meetings with the employees to give us updates on what was going on. They weren't a rehash of the financials or a review of the sales figures; they were frank discussions on where the company needed to go to continue to grow and how we were going to get there. With a detailed understanding of what the plan was, each of us could see how what we and our part of the company did would help us achieve our goals.

When National Semiconductor bought Itel, much of that disappeared because the new owners didn't share the same view of people. Productivity went down, turnover went up, people were treated with indifference, and most people moved on. I look around the industry today, and I see far too few companies focusing a lot of effort and attention on the employees.

THE RISKS OF POOR PEOPLE MANAGEMENT

When I look at how people are being managed, a key issue comes to mind—we may be micromanaging people too much. We have software in place that seemly tracks each sales person’s every move. At some point, micromanaging will start to have an impact on a person’s self-esteem. Employees will wonder how they are viewed by the company—whether they are really trusted.

Another thing that concerns me is that I have heard several of my peers say that they aren't concerned about turnover in their organizations because the job market is still shaky and employees are lucky to have their jobs. That may very well be true, but that is short-sighted thinking for two reasons. First, if you treat your people poorly they'll give you 40 hours a week, but not much more. You don't see the parking lots filled past 5:00 PM or on weekends anymore.

And what about the 40 hours they do give? What is the impact on the quality of their efforts if their focus is wavering or their attitude is poor? I don’t believe people are as motivated as they used to be, and that's management’s challenge going forward.

The second thing to consider is what happens when there are new jobs available in the industry? If over the past couple of years your people have been staying with you in spite of what you have done to them versus because of what you have done for them, then you could see a nasty spike in turnover. When your competitors or firms in other industries start recruiting productive salespeople, are your reps going to take those phone calls?

When you take a look at how long it takes to get a new sales person up to full productivity, it is frightening to think about what will happen if 10%, 15%, 20% of your current producing reps decide to pursue other opportunities outside of your company. In addition to lost revenues, you are looking at unbudgeted recruiting fees, training costs, hits to the productivity of your sales managers as they have to spend extra time mentoring and coaching their new team members, etc. We need to be thinking about contingency plans in case this happens.

RETENTION

A better approach to minimize the chances of turnover rising is to begin with putting in place plans to retain productive sales talent, now. Over my career, when I have mentioned the concept of retention strategies, I often observed my CFO counterpart’s radar turn on, and the question quickly comes up, “How much is this going to cost?” My response has been simple, “A lot less than it will cost us if our best and most effective reps leave!”

Before I talk about what can work to retain and motivate salespeople, let me mention something that doesn't work. Today with the very tight budget constraints we are all under, we have lost the ability to show people their worth through merit raises. If an average raise is 2% and a super raise is 3%, the extra $15 a week it represents to a sales rep with a $75,000 base is not much of a motivating force to get him or her to want to keep working at an extraordinary level. But there are other things to consider other than raises.

A key exercise to do before you look at retention strategies is to fully explore why salespeople leave. When I think back to the number of exit interviews where we asked why they were leaving, money was rarely the main issue. Other factors, such as a problem with an immediate manager, a sense of stagnation in their current roles, a feeling that they were not being valued or supported, etc., were the main reasons discussed.

These can all be legitimate reasons for them to feel they have to leave, so what can we do to effectively deal with them? Looking at the issue of the effectiveness of a person's existing manager, the more we can do to make the manager an asset to the rep, the less likely they are going to want to give up having access to that resource. Because of this, I am a big believer in investing in sales management development. If sales managers know how to coach and mentor their team, they can instill a sense of loyalty that can become a reason to say "no" to recruiters.

To avoid stagnation, we need to give people the opportunity for full careers in sales. One major software company has a five-step path progressing from inside rep, to field rep, to major account rep, to worldwide account rep, to consulting advisor where they work with other salespeople. This last position is not in a management capacity, but rather a strategy and tactics advising role on specific deals. Through this program, if individuals really love selling, they have a path for advancement that doesn't require them to go into management.

RECOGNITION

We can show people they are valued through recognition. This is one area that needs to take on a new emphasis. It can be as simple as catching people doing something extra and recognizing their efforts in front of their peers. For years we have seen the impact little awards can have on getting extra efforts from sales teams; people really try for the rep of the month or quarter plaques. But there are newer, more innovative methods we can use.

For example, a colleague of mine created what he calls the Seals Program within his sales force. The “best of the best” reps, the top couple percent, are invited to be part of the Seals Team which serves as an advisory board. When management sees a challenge that needs to be addressed such as increasing margins, the task for coming up with possible solutions is turned over to the Seals. They are the ones closest to the customer, the competition, and the realities of the markets they sell into, so they are asked to propose ways to deal with the problem.

Two things come out of this process. First, they almost always come up with an effective way to deal with the challenge. Second, the people on the Seals Team feel valued because people are asking for and acting on their opinions. This program has been in place for a few years now, and the turnover of Seals is non-existent.

Motivation is a major aspect of leadership, and it has to come from the top. The CEO down to individual sales managers need to have a focused plan for how to motivate their people. Recognition used to be looked at as something you did through raises, but more and more rewarding people by recognizing their contributions pays a much higher dividend than a monetary approach.

COMMUNICATION

Communication is another major part of the retention and motivation equation. People want to know what's going on. If you don't go out of your way to keep everyone informed as best you can, then you will find that employees will spend hours talking to their friends at work trying to guess what's happening. You can gain hours of additional productivity per employee if you just tell them, up front and regularly, what the status of the company or their department is.

This starts with sharing the vision for the company, the goals and objectives for achieving the vision, what everyone's role is in making those objectives, and then providing regular feedback on where you are in the process. This includes giving people bad news as soon as possible. You have to be honest and take your arrows up front. If things are bad, let people know and then make them part of the solution. There are very few secrets in companies anymore, and if you don't communicate well internally, it will cost you dearly in time spent having to manage misinformation.

A major part of communication involves setting realistic goals and then backing them with action. *Realistic* is the key word here. If you ask your people to run back to back to back four minute miles, they will fail—and that's a major de-motivator. Motivation comes from achieving goals, not missing them. That's not to say that the goals can't be a stretch. The goals need to be well thought out, understood across the organization, and accepted by the people involved as achievable. There is nothing worse than a plan no one believes in.

TRAINING

Another key retention/motivator strategy is showing employees that you care by investing in them. Sending employees to a skills class tells them that you think they are important to the company and worth developing to their fullest potential. The payback is normally seen very quickly in terms of increases in productivity.

Due to the economy over the past two years, many companies backed away from a formal training cycle because of the expense and the concern that training employees would make them that much more attractive to the outside world. Yes, some people you train will leave. But the payback you will get from the majority of the employees who stay, plus the productivity gains from having everyone speaking the same language as a result of going through the same training, are worth the risk. Again, it's a motivation issue, and developing new skill sets is something most good employees want to do.

MINIMIZING DE-MOTIVATION

One final part of retention and motivation management is controlling de-motivation. There will always be cases where problems arise, and you have to handle them aggressively to minimize their impact. People may become bored, not see any growth in their jobs, not see the company going places, feel taken for granted, be in conflict with other departments, etc. When these cases arise, you have to jump on them early and hard—understand what the problem is and do something about it.

What you choose to do is very important. As I mentioned before, a raise is rarely the answer. If they were fundamentally unhappy before the raise, they'll probably revert back to being unhappy a few days or weeks after the raise kicks in. You need to find the underlying cause of their problems and fix them. If a person is continually unhappy, and there is nothing you can honestly do to correct the problem, then you need to get rid of that person. Dissatisfaction can be contagious, and you can't afford the impact today.

ADVICE TO MY PEERS

First, let me point out the obvious. We are going to have to deal with the motivational issues one way or another. You are better served if you approach problems proactively; otherwise, you're going to spend much of your time in "damage-control mode." Going forward, we have to become more effective coaches to our sales teams. We have to trust them, empower them to do more, and recognize them for their efforts.

If you are going to initiate a new retention/motivation program, begin by ensuring that your key employees are motivated and on-board. If the people that other employees respect are excited about what they are doing and where the company is going, they can help you get everyone else pumped up. On the other hand, if they are down, everyone else looks at them and says, "Boy, if they're worried, things must really be bad."

Finally, we need to remember that motivation is not about how to motivate 50 people at once, it's how you motivate each of those 50 people individually. It's a significant investment in time and resources, but today you don't have a choice. It's our people who make things happen. You can have the best product in the world, but if your people aren't behind it, you're dead. If your retention/motivation plan isn't as important as your product plan, revenue plan, or channels plan, then you will have a hard time making it through this decade.

About CSO Insights

CSO Insights benchmarks the challenges faced by today's sales and marketing organizations. We track trends in the usage of people, process, technology, and knowledge to improve sales effectiveness.

Research is the core of our business. Each year, we survey thousands of Chief Sales Officers (CSOs) to learn the challenges they see as most critical. We also review offerings from solution providers to retain our position as the experts on solutions for CSOs.

We write numerous articles and speak at major sales and marketing conferences to share what we've learned from executives like you.

Founded by Jim Dickie and Barry Trailer, CSO Insights has served sales and marketing executives for over 18 years. We offer only pragmatic suggestions, experienced-based examples and the kind of insights you'll want before your next executive strategy session or Board Meeting!