

“My first reaction was ‘where are all the answers?’, but as I read the book I realized the power and elegant simplicity of forcing you to think through your own answers to each question.”

— TOM MARTIN, *FORMER PRESIDENT OF NORTH AMERICA FOR MILLER HEIMAN, INC.*

99 QUESTIONS TO ACHIEVING YOUR SALES GOALS



**How to Manage Successful Sales Teams
Just by Asking (and Answering)
the Right Questions**

Terence A. Walsh | David A. Falter

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QUESTIONS TO ACHIEVING SALES GOALS

Asking the Right Questions

In 1996, Mihaly Csikszentmihalyi, a psychology professor at the University of Chicago, discovered how Nobel laureates and other creative people achieved their breakthroughs— Once they asked themselves the right question, their ideas flowed rapidly.

Ten years later, McKinsey & Co. took this finding one step further by examining how the most successful companies in recent history (startups to F500 firms) had achieved their positions. They found that a number of important innovations sprang from responses to particular questions.

Your Sales Goals

In Sales, the most successful Sales Teams focus on the details to achieve breakthrough sales performance. They do this by asking the right questions about their sales process, compensation, prospecting, sales management skills and how they communicate with customers.



This book as intended as a tool to help sales managers, sales executives and senior management understand the necessary fundamentals to effectively achieve revenue goals every year.

If you ask (and answer) the right questions, you can make your numbers. Isn't that the whole point?

DEDICATION

This book is dedicated to those sales persons and sales managers who believe as we do that sales is a career and a practice, and that attention to detail, adherence to the process, passion for your product, and dedication to your customers will make you a top-performing sales executive.

ACKNOWLEDGEMENTS

This book is derived from the intertwined career experience and friendship of two sales guys who, for over 15 years, have agreed on almost everything having to do with sales and sales management. Our collective experiences and sacrifices together as colleagues and friends have allowed us to build and manage several successful sales teams. We are both grateful for the opportunities we have had to work together.

Thanks to Lona Dedrickson, who inspired Terry to get into sales. Thanks to Len Zera and Rob Woods, who demonstrated by example what it means to be a great sales leader. Thanks to TJ Felice, who proved to Terry that his ideas about selling and consulting were right. Thanks to Frank Visgatis, who taught us to value customers and ask good questions.

Terry thanks his wife and life partner Mary, whose constant cheerleading inspired him to success in his sales career.

Dave thanks his wife Margie, who has been the best sales manager a salesman could ask for – tough but fair, and ruthlessly persistent.

Thanks from both of us to John Fox, who is living proof that sales and marketing can and should work together. We appreciate John's insights, coaching and encouragement in helping us publish this book!

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INTRODUCTION

Sales is not about magic and mythology.

In our experience, numerous sales myths and misperceptions have come to be regarded as fact when they couldn't be further from the truth. In his blog, MBA4Sales, Terry describes how he became a top performing sales person and a sales leader by disproving the myth that successful sales people have to be "sales personalities" (meaning a type of "people person" with an aggressive and persistent communications style - think used-car salesman) who accomplishes objectives by "reading" the customer and smoothly closing the deal with a smile and a slap on the back.

The point is that 99% of today's modern, successful sales people are made, not born, and successful sales teams are not managed based on upon mythology. The best sales managers and their teams work hard to accomplish their revenue targets. What is not a myth is that "the devil is in the details". The details we're talking about are the things that sales people and managers dislike or disregard, like inputting customer information into CRM, or properly preparing for customer discussions by doing role playing before an important sales call.



Sales managers and executives will adamantly tell you that they understand this need and that they are committed to doing these things. Yet, in client after client, we find that 80% of them don't address the details. Ironically, about 80% of sales teams also don't make their numbers. The 20% that do can answer the questions in this book by explaining what they are doing to address the details – that is why they are succeeding. If you don't do these things because you are “too busy selling”, you have already set yourself up to fail.

This book is designed to stimulate your thinking about the operational things sales teams must do to be successful. People often overlook these items, not understanding why they need to do them. To use a health care analogy, the questions in this book will either provide you with “aspirin” or with “vitamins”. People who practice preventative medicine are statistically much healthier and live longer lives than those who wait until they are really sick to get medical care.

If you are currently not making your numbers (“aspirin”), this book can help you understand what you need to do to begin to make them. If you are trying to greatly accelerate your team's productivity (“vitamins”), answering these questions will help you identify how to achieve greater sales scale and velocity. If you can answer all the questions in detail about how you do each of these things today, congratulations! You are probably already a top sales performer or sales manager.



If you can honestly answer the questions herein and describe what and how you manage the details, then you will be on your way to having a repeatable successful sales process. As you go through these questions, we hope you consider the details you are overlooking, and begin to think through how addressing them will help you to be a better sales manager or sales team member.

*Avoid the selling magic
and mythology and make
sales success a reality!*

SALES PROCESS



Sales Cycle

Pipeline Reporting

Qualification

Forecasting

Opportunity Quality

Funnel Metrics

SALES PROCESS *Sales Cycle*



WHAT ARE THE STEPS IN YOUR SALES CYCLE?

If you have not identified
the steps, what things
are preventing you from
doing so?

SALES PROCESS
Sales Cycle



2

**HOW DOES YOUR
SALES PROCESS
COMPARE TO YOUR
CUSTOMER'S TYPICAL
BUYING PROCESS?**

What about your process
is different than what your
customers expect?

SALES PROCESS
Sales Cycle



**HOW DO YOU KNOW
IN YOUR BUSINESS
WHEN A DEAL
IS CLOSED?**

SALES PROCESS
Pipeline Reporting



4

**WHAT ARE YOUR
GROUND RULES FOR
HOLDING SALES REPS
ACCOUNTABLE FOR
MANAGING THEIR
SALES OPPORTUNITIES?**

How are those rules
communicated to them?

SALES PROCESS
Pipeline Reporting



5

**HOW DO YOU
UNDERSTAND WHETHER
A SALES PERSON
IS MEETING REVENUE
OBJECTIVES?**

SALES PROCESS
Pipeline Reporting



6

**HOW DO SALES
PEOPLE UPDATE
SALES AND BUSINESS
MANAGEMENT ABOUT
SALES OPPORTUNITIES?**

SALES PROCESS
Pipeline Reporting



**HOW DO SALES
PEOPLE DOCUMENT
THEIR PROGRESS
WITHIN EACH SALES
OPPORTUNITY?**

SALES PROCESS
Qualification



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**WHAT IS YOUR
PROCESS FOR
OPPORTUNITY
QUALIFICATION?**

SALES PROCESS
Qualification



**HOW DO YOU
KNOW WHEN AN
OPPORTUNITY IS
QUALIFIED?**

SALES PROCESS
Qualification



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**WHAT DOES THE
SALES PERSON DO
TO PROVE AN
OPPORTUNITY SHOULD
BE QUALIFIED?**

SALES PROCESS
Qualification



11

**IF A DEAL IS
QUALIFIED, WHAT
TASKS HAVE YOU
DEFINED TO MOVE
FROM QUALIFICATION
TO THE NEXT STAGE
IN THE SALES CYCLE?**

SALES PROCESS
Forecasting



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**WHAT IS YOUR
PROCESS FOR HAVING
SALES PEOPLE CREATE
SALES FORECASTS?**

SALES PROCESS
Forecasting



13

**APPROXIMATELY WHAT
PERCENT OF THE
TIME DO YOUR SALES
PERSONNEL ACTUALLY
HIT THE FORECAST?**

Why?

SALES PROCESS
Forecasting



14

**WHAT IS THE
“SCHEDULE” OR
TIMELINE, FOR
COMPLETING A SALES
OPPORTUNITY ONCE
IT IS IDENTIFIED?**

SALES PROCESS
Forecasting



15

**WHAT HAPPENS
IF AN OPPORTUNITY
FALLS BEHIND
SCHEDULE?**

SALES PROCESS
Forecasting



16

**HOW DO YOU DECIDE
AN OPPORTUNITY NO
LONGER BELONGS IN
A SALES PERSON'S
FORECAST?**

SALES PROCESS
Forecasting



17

**HOW DO YOU
PERFORM FORECAST
REVIEWS WITH YOUR
SALES PEOPLE?**

SALES PROCESS
Opportunity Quality



18

**HOW DO SALES
PEOPLE JUDGE
THE QUALITY
OF OPPORTUNITIES?**

How do their
assessments differ
from your assessments?

SALES PROCESS
Opportunity Quality



19

**WHAT CRITERIA
DO YOU HAVE TO
HELP YOU EVALUATE
HOW “GOOD” AN
OPPORTUNITY IS?**

SALES PROCESS
Opportunity Quality



20

**HOW DO YOU
PRIORITIZE WHAT DEALS
SHOULD BE WORKED
AND WHAT DEALS
SHOULD BE PUT ON
THE BACK BURNER?**

SALES PROCESS
Opportunity Quality



21

**HOW DO YOU FACTOR
IN INFORMATION
ABOUT COMPETITION
IN YOUR ASSESSMENT
OF EACH OPPORTUNITY?**

SALES PROCESS
Opportunity Quality



22

**HOW DO YOU
FACTOR IN INFORMATION
ABOUT CHANNEL
PARTNERS IN YOUR
ASSESSMENT OF
EACH OPPORTUNITY?**

SALES PROCESS
Opportunity Quality



23

**WHAT OPPORTUNITY
QUALITY MEASURES ARE
USED TO DETERMINE
OPPORTUNITY
PROBABILITY?**

SALES PROCESS
Funnel Metrics



24

**WHAT PROCESS DO
YOU USE TO DETERMINE
THE PROBABILITY THAT
EACH OPPORTUNITY
WILL CLOSE AT EACH
STAGE IN THE
SALES CYCLE?**

SALES PROCESS
Funnel Metrics



25

**HOW DO YOU
COLLECT HISTORY
ABOUT HOW DEALS
PROGRESSED THROUGH
THE SALES CYCLE?**

SALES PROCESS
Funnel Metrics



26

**WHAT INFORMATION
DO YOU USE TO
REVIEW SALES REP
PERFORMANCE
AGAINST QUOTA?**

SALES PROCESS
Funnel Metrics



27

**WHAT HAPPENS
IF A SALES PERSON
FALLS BEHIND
ON QUOTA?**

What is the process
for quota recalculation?

SALES PROCESS
Funnel Metrics



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**HOW ARE QUOTA,
SALES CYCLE AND
PIPELINE METRICS
COMMUNICATED TO
EACH SALES PERSON?**

COMPEN- \$ATION



Comp Planning
Comp Management
Profit based Comp
Sales / Marketing
Alignment

COMPENSATION
Comp Planning



29

**HOW ARE SALES
COMPENSATION PLANS
DESIGNED TO INCENT
SIGNIFICANT REVENUE
MOVEMENT?**

COMPENSATION
Comp Planning



30

**HOW HAVE
YOU DOCUMENTED
YOUR SALES
COMPENSATION PLAN?**

COMPENSATION
Comp Planning



31

**WHAT FACTORS IN
YOUR COMPENSATION
PLAN DO YOU BELIEVE
MOTIVATES A SALES
PERSON TO PRODUCE
MORE REVENUE?**

COMPENSATION
Comp Planning



32

**HOW HAVE YOU
FACTORED IN THE
LENGTH OF THE
SALES CYCLE IN
DESIGNING YOUR
COMP PLAN?**

COMPENSATION
Comp Planning



33

**HOW DOES YOUR
PLAN TAKE INTO
CONSIDERATION
COMPENSATION FOR
DEALS WITH EXISTING
CUSTOMERS VERSUS
NEW CUSTOMERS?**

COMPENSATION
Comp Planning



34

**TO WHAT DEGREE IS
AN ANNUITY ELEMENT
BUILT INTO YOUR
COMP PLAN?**

How long do sales personnel receive compensation for a opportunity after they close it?
How does this improve sales performance?

COMPENSATION
Comp Management



35

**HOW ARE YOUR
SALES COMPENSATION
PLANS DESIGNED
TO REWARD SALES
PEOPLE?**

COMPENSATION
Comp Management



36

**WHAT RATIONALE
DETERMINES THE
PERCENTAGE OF
SALES PEOPLE THAT
ACHIEVE COMPENSATION
TARGETS?**

COMPENSATION

Comp Management



37

ARE EXPENSE CONTROLS USED TO MANAGE THE COMP PLAN?

Are commissions, bonuses, etc. limited based on cost concerns? What happens if actual performance causes commissions paid to exceed expense limits?

COMPENSATION
Profit based Comp



38

**HOW IS DEAL
PROFITABILITY FACTORED
INTO A SALES PERSON'S
COMP PLAN?**

How are your sales
personnel measured on
the profitability of the
opportunities they close?

COMPENSATION
Profit based Comp

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**HOW DOES PRODUCT
VOLUME FACTOR
INTO YOUR
COMPENSATION PLAN?**

Are sales people
compensated on the
total size of opportunities
based on units or
total revenue?

COMPENSATION
Profit based Comp



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**HOW DOES THE
COMPENSATION PLAN
FOCUS ON MAXIMIZING
REVENUE PER DEAL
VERSUS PROFIT
PER DEAL?**

COMPENSATION
Sales/Marketing Alignment



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**HOW DO SALES
COMPENSATION PLANS
ALIGN WITH OTHER
BUSINESS UNITS'
METRICS, ESPECIALLY
MARKETING?**

COMPENSATION
Sales/Marketing Alignment



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**WHAT ARE THE
PRIMARY COMPENSATION
METRICS OF MARKETING
PERSONNEL?**

How do they align with
or compete with Sales
compensation metrics?

COMPENSATION
Sales/Marketing Alignment



43

**MANY MARKETING
ORGANIZATIONS ARE
COMPENSATED ON
QUALIFIED LEADS
GENERATED. WHAT
CONSTITUTES A LEAD
THAT QUALIFIES FOR
COMPENSATION?**



MARKETING



Lead Generation

MARKETING
Lead Generation



44

**FROM A SALES
MANAGEMENT
PERSPECTIVE, WHAT
DOES MARKETING
DO TO GENERATE
VIABLE SALES LEADS?**

MARKETING
Lead Generation



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**WHAT IS THE
PROCESS FOR
COLLECTING AND
MANAGING QUALIFIED
LEADS?**

MARKETING
Lead Generation



46

**WHEN IS A
LEAD CONSIDERED
QUALIFIED?**

How does this align
with Sales' definition
of a qualified lead?

MARKETING
Lead Generation



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**WHAT IS THE
PROCESS FOR
HANDING OFF A
LEAD TO SALES?**

MARKETING
Lead Generation



48

**WHAT PERCENTAGE OF
LEADS TRANSITIONED
TO SALES ARE
QUALIFIED?**

What percentage of
leads actually close?
How does this compare
to business objectives?

MARKETING
Lead Generation



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**WHAT IS THE
MARKETING STRATEGY
AND PLAN TO IMPROVE
QUALIFIED AND
CLOSED LEADS?**

MARKETING
Lead Generation



50

**HOW DOES THE
COMPANY'S BUSINESS
MODEL DICTATE HOW
LEADS MUST
BE GENERATED?**

For example, retail and home based sales depend on leads because they are “closer” business models.

MARKETING
Lead Generation



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**WHAT MARKETING
TACTICS PRODUCE
THE MOST LEADS?**

Why do these tactics
work versus others?

MARKETING
Lead Generation



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**WHAT IS THE PROCESS
FOR DETERMINING
LEAD QUALITY?**

Who is involved
and what decisions
are made?

MARKETING
Lead Generation



53

**HOW ARE LEAD
GENERATION
PROGRAMS EVALUATED?**

How often is this done?
Who is involved? What
happens if a program is
judged to be inadequate?
How are new tactics
added to the mix?

SALES MANAGEMENT



**Sales Rep Hiring
Process**

**Sales Rep Hiring
Attributes**

**Management
Forecasting**

**Sales Performance
Management**

Role Playing

SALES MANAGEMENT
Sales Rep Hiring Process



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**WHAT ATTRIBUTES
WOULD YOU ASSOCIATE
WILL AN EXCEPTIONAL
SALES HIRING PROCESS?**

Why?

SALES MANAGEMENT
Sales Rep Hiring Process



55

**WHO IS RESPONSIBLE
FOR HIRING
SALES PEOPLE?**

How would you
evaluate their
effectiveness?

SALES MANAGEMENT
Sales Rep Hiring Process



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**WHAT TRAINING
DO SALES MANAGERS
RECEIVE ABOUT
HOW TO INTERVIEW
AND EVALUATE SALES
REP CANDIDATES?**

SALES MANAGEMENT
Sales Rep Hiring Process



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**WHAT ARE THE
PRIMARY SOURCES
OF SALES REP
CANDIDATES?**

SALES MANAGEMENT
Sales Rep Hiring Process



58

**WHAT PROCESS
IS USED TO SOURCE
AND SELECT SALES
CANDIDATES?**

SALES MANAGEMENT
Sales Rep Hiring Process



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**HOW ARE SALES
REP CANDIDATES
SCREENED PRIOR TO
INTERVIEWING WITH
THE SALES MANAGER?**

SALES MANAGEMENT
Sales Rep Hiring Process



**WHAT OTHER
PERSONNEL INTERVIEW
THE CANDIDATE BESIDES
THE SALES MANAGER?**

Why?

SALES MANAGEMENT
Sales Rep Hiring Process



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**WHAT PROCESS
IS USED TO SELECT
A CANDIDATE ONCE
INTERVIEWS ARE
CONDUCTED?**

SALES MANAGEMENT
Sales Rep Hiring Attributes



62

**WHAT IS THE
PHILOSOPHY ABOUT
THE LEVEL OF PRIOR
SUCCESS A SALES
PERSON HAD
BEFORE JOINING
YOUR BUSINESS?**

Do you expect to only
hire “A” players?

SALES MANAGEMENT
Sales Rep Hiring Attributes



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**WHAT IS THE
EXPECTATION ABOUT
A SALES PERSON'S
“ROLODEX”?**

SALES MANAGEMENT
Sales Rep Hiring Attributes



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**HOW DO YOU
ASK SALES REP
CANDIDATES TO
PROVE PRIOR
PERFORMANCE?**

SALES MANAGEMENT
Sales Rep Hiring Attributes



65

**DO YOU USE AN
ASSESSMENT TOOL,
SUCH AS A PERSONALITY
TEST, TO EVALUATE
CANDIDATES?**

Why? To what degree has this led to selection of candidates that meet or exceed sales performance criteria?

SALES MANAGEMENT
Management Forecasting



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**WHAT IS THE
SALES MANAGEMENT
PROCESS TO PROPERLY
QUALIFY AND/OR
RATIONALIZE SALES
FORECASTS?**

SALES MANAGEMENT
Management Forecasting



67

**HOW DO SALES
MANAGERS EVALUATE
FORECASTS BEFORE
THEY SUBMIT THEM
TO EXECUTIVE
MANAGEMENT?**

SALES MANAGEMENT
Management Forecasting



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**DO SALES MANAGERS
NEED TO “DOCTOR”
SALES REP FORECASTS
BEFORE THEY
TURN THEM IN?**

If so, why?

SALES MANAGEMENT
Management Forecasting



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**WHAT SPECIFIC
CRITERIA ARE DEFINED
AND PUBLISHED
FOR OVERRIDING A
REP'S FORECASTED
OPPORTUNITY?**

SALES MANAGEMENT
Management Forecasting



70

**WHAT STEPS DO
YOU TAKE AS A SALES
MANAGER TO ENSURE
FORECAST ACCURACY
FROM YOUR TEAM?**

SALES MANAGEMENT
Sales Performance Management



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**HOW ARE SALES
MANAGERS EXPECTED
TO MANAGE SALES
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SALES MANAGEMENT
Sales Performance Management



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**WHAT METHODS
ARE USED BY YOUR
SALES MANAGERS TO
DIAGNOSE POOR SALES
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SALES MANAGEMENT
Sales Performance Management



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**WHAT ARE THE KEY
SALES PERFORMANCE
METRICS USED TO
EVALUATE SALES
PERFORMANCE?**

SALES MANAGEMENT
Sales Performance Management



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**WHAT HAPPENS
IF A SALES PERSON
IS FOUND LACKING
IN ONE OR
MORE METRICS?**

SALES MANAGEMENT
Sales Performance Management



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**UNDER WHAT
CIRCUMSTANCES WOULD
A “PERFORMANCE PLAN”
BE ISSUED TO A LOW
PERFORMING REP?**

How long are
reps given to change
their performance?

SALES MANAGEMENT
Sales Performance Management



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**IF A REP FAILS
TO EXECUTE ON A
PERFORMANCE PLAN,
WHAT ARE THE
NEXT STEPS?**

SALES MANAGEMENT
Role Playing



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**WHAT TRAINING
DO SALES PERSONNEL
RECEIVE ABOUT THE
FIRM'S SALES PROCESS?**

What is done at hiring?
What is done on period basis?
How would you assess the
adequacy of this training?

SALES MANAGEMENT
Role Playing



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**WHAT, IF ANY SALES
BEHAVIORS ARE
ADDRESSED USING
ROLE PLAYING?**

How often is this done?
How adequate is
this effort?

SALES MANAGEMENT
Role Playing



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**HOW IS ROLE
PLAYING FACILITATED
BY SALES MANAGERS?**

SALES MANAGEMENT
Role Playing



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**HOW ARE ROLE
PLAYING SCENARIOS
INCORPORATED INTO
SALES TRAINING?**

SALES COMMUNICATIONS



**Product Information
Marketing Integration**

SALES COMMUNICATIONS
Product Information



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**HOW ARE SALES
PEOPLE TRAINED IN
THE FIRM'S PRODUCTS
AND SERVICES?**

SALES COMMUNICATIONS
Product Information



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**HOW DO YOU
EVALUATE A SALES
PERSON'S KNOWLEDGE
ABOUT PRODUCTS
AND SERVICES?**

SALES COMMUNICATIONS
Product Information



83

**WHAT IS DONE TO
ENSURE THAT SALES
PEOPLE ARE ACCURATELY
COMMUNICATING
PRODUCT AND SERVICE
INFORMATION TO
CURRENT AND
POTENTIAL CUSTOMERS?**

SALES COMMUNICATIONS
Product Information



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**HOW DOES
COMMUNICATING
PRODUCT INFORMATION
PLAY A ROLE IN
THE SALES CYCLE?**

SALES COMMUNICATIONS
Product Information



85

**HOW MUCH OF THE
PRODUCT INFORMATION
PROVIDED TO SALES
IS COMMUNICATED VIA
OTHER MEDIA, SUCH
AS WEBSITE, CATALOGUES
OR ADVERTISING?**

SALES COMMUNICATIONS
Marketing Integration



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**HOW DO THE
MATERIALS AND
COMMUNICATIONS
CREATED BY MARKETING
COMPARE WITH WHAT
SALES PEOPLE
TELL CUSTOMERS?**

SALES COMMUNICATIONS
Marketing Integration



87

**HOW DOES
MARKETING PREPARE
SALES MATERIALS
FOR USE BY SALES
PERSONNEL?**

**TO WHAT DEGREE
IS MARKETING
INVOLVED IN CREATING
COMMUNICATIONS
THAT FACILITATE
SALES DIALOGUES
WITH CLIENTS?**

(e.g., scripts, prospecting
materials, proposals)

SALES COMMUNICATIONS
Marketing Integration



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**HOW DOES
MARKETING PROVIDE
CUSTOMER FEEDBACK
TO SALES?**

How does Sales provide
customer feedback
to Marketing?

SALES COMMUNICATIONS
Marketing Integration



90

**HOW DOES
MARKETING PLAY
A ROLE IN DETERMINING
TARGET CUSTOMERS,
DEFINING SALES
TERRITORIES OR OTHER
SALES PLANNING?**

SALES COMMUNICATIONS
Marketing Integration



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**WHAT CUSTOMER
INTERACTIONS
DOES MARKETING
PARTICIPATE IN?**

Are Marketing personnel invited to participate in sales calls? Do Marketing personnel participate in sales activities such as proposals?

**WHAT IS THE
PRIMARY FOCUS OF
THE MARKETING
ORGANIZATION (BRANDING,
IMAGING, ADVERTISING,
PUBLIC RELATIONS,
BUSINESS DEVELOPMENT,
SALES SUPPORT)?**

Why?



PROSPECTING



**Lead Generation
Sales Meetings**

PROSPECTING
Lead Generation



93

**WHAT PROSPECTING
ACTIVITIES ARE
YOUR SALES PERSONNEL
ASKED TO PERFORM?**

What metrics are
defined for those activities
and how are they measured?

PROSPECTING
Lead Generation



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**FOR EACH PROSPECTING
ACTIVITY, WHAT
INFORMATION IS
PROVIDED TO EACH
SALES PERSON TO
PERFORM THAT TASK?**

For example, are scripts
provided to Sales personnel
for prospecting?

PROSPECTING
Sales Meetings



95

**DURING WHAT STAGES
IN THE SALES
CYCLE ARE SALES
PEOPLE EXPECTED
TO CONDUCT FACE
TO FACE MEETINGS?**

What expectations are set for Sales people in conducting F2F sales calls?

PROSPECTING
Sales Meetings



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**WHAT INFORMATION
DO YOU EXPECT A
SALES PERSON TO
COLLECT BASED ON
CONDUCTING A
SALES CALL?**

Where is this
information documented?

PROSPECTING
Sales Meetings



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**HOW DO YOUR
SALES PEOPLE
SCHEDULE MEETINGS
WITH CUSTOMERS?**

What process and
tools are used to
perform scheduling?

PROSPECTING
Sales Meetings



98

**DESCRIBE HOW
YOU PREPARE
SALES PEOPLE FOR
PROSPECTING. FOR
EXAMPLE, WHAT
TRAINING DO YOU
PROVIDE, ROLE
PLAYING, ETC.?**

PROSPECTING
Sales Meetings



**WHAT SALES
TACTICS ARE USED
IN SALES CALLS?**

For example, are there
trial closes?

PROSPECTING
Sales Meetings



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**BONUS
QUESTION**

**WHEN DOES A
SALES PERSON
TYPICALLY ASK
FOR BUSINESS?**

Why?



ABOUT *Terry Walsh*

Terry Walsh has over 30 years of experience across business development, sales operations, and executive management. He currently leads the Sales Organization & Operations practice for **Acorn Growth Partners**, a boutique management consultancy focused on helping middle market business enterprises attain market traction and profitable revenue growth.

Terry works with clients to transform their sales process and selling practices, learn and implement sales methodologies, and effectively utilize CRM systems. Prior to joining Acorn, Terry worked as a senior executive in sales roles for leading companies including Culligan International, Cendant Corporation, Whitman-Hart/marchFIRST, Digital Equipment Corporation, and others.



After many years doing work for and consulting with companies that asked him to help rebuild their sales processes, Terry believes that the real challenge for most firms is to rid themselves of the widely held myths and misperceptions about sales management and operations. Over the past decade, he has developed new approaches to the creation, organization, and management of successful sales teams, addressing best practices in sales management, operations, revenue strategy and sales transformation.

Terry shares his thought leadership at his website, **www.MBA4Sales.com**.

Terry received a BBA in Business from the University of Iowa with majors in Management and Management Information Systems.



ABOUT *Dave Falter*

Dave Falter is the Managing Partner of Acorn Growth Partners, a boutique management consulting firm targeting sub-\$200MM companies. AGP clients typically are experiencing sluggish or stalled growth, and the owners wish to regain market traction and achieve higher unit margins. Dave's consulting expertise focuses on top-line, profitable revenue growth through a holistic and harmonious approach to selling, marketing, product/service portfolio management, combined with streamlined, rationalized operations.

Dave has served as an investment executive with Sterling Partners, a \$4BB+ Chicago-based private-equity company, where he also worked as CEO for several investment portfolio companies. Prior, Dave was President of Galileo Americas, an electronic travel distribution business unit and Fortune 1000 company.



As a six-time chief executive, Dave has been successful in leadership roles across varied industries because he continually focuses on the creation of a dynamic, mission-driven, customer centric team. He is a collaborative, inclusive, empowering leader who inspires dedication, hard work, and loyalty from organizations. As a consultant, Dave works with owner/operators, and shareholder Boards to integrate these behaviors and practices into their organizations.

Dave works with clients to ensure that all executive team members have the tools and the guidance they need to be high-performing, growing, continually engaged executives within their functional domain and in their overall leadership of the enterprise. He shares his philosophy on leadership and managerial excellence in his blog, **www.mushermanagement.com**.

—| ENDORSEMENTS |—

“My first reaction was ‘where are all the answers?’, but as I went through the book I realized the power and elegant simplicity of forcing you to think through your own answers to each question. Assign one of these questions to each of your sales reps on a weekly basis and you have a great foundation for development and coaching.”

— **TOM MARTIN**, *FORMER PRESIDENT OF NORTH AMERICA FOR MILLER HEIMAN, INC.*

“Most Sales books that I choose to read (or am asked to read) end up being “theoretical”. **99 Questions to Achieving Your Sales Goals** is a practical, actionable guide to meet and exceed your sales goals. If you ask these questions and act on the answers your sales performance will improve.”

— **FRANK VISGATIS**, *CO-FOUNDER AND CO-AUTHOR, CUSTOMERCENTRIC SELLING® PRESIDENT & COO, CUSTOMERCENTRIC SYSTEMS* “

“**99 Questions to Achieving Your Sales Goals** is more than just a terrific toolbox for any executive trying to wrangle his or her salespeople into a more productive team. What sets this book apart is how useful it becomes in day-to-day decision making. And don’t be misled by its simplicity. **99 Questions...** is an easy read with a deep and useful shelf life. Nobody who manages a sales team with more than five people should be without it.”

— **DON DIPIETRO**, *EXECUTIVE VP, COO, CERTIFIED TRUSTMARK SERVICES*“

Every sales executive should read and consider these **99 Questions**, especially if you are trying to establish a new sales organization or significantly change your current organization or business development processes. I wish that I had this list of questions a few years ago: it would have saved a lot of time, effort, and eventual re-work. You can see Terry's and Dave's extensive business management experience coming through each of the questions and how they are worded."

— **SCOTT YOUNG**, *MANAGING PARTNER, ROSETTA CONSULTING*

"Terry and Dave have identified the secret sauce to driving achievement of sales goals. Having a process is more important than the specific process you choose. Therefore creating and/or documenting answers to the **99 Questions** forces leadership to develop a process which can become the standard of operating the sales and marketing organization. Consistently achieving goals and understanding how you got there are the keys to sustained growth. This book provides the foundation to achieve just that."

— **CAMILLE OLIVERE**, *VICE PRESIDENT OF SALES, AMERICAS, NORWEGIAN CRUISE LINES*

"Terry and Dave present compelling questions that warrant compelling answers if you want to find the Holy Grail for achieving consistent company growth - predictable & sustainable revenue! Every quarter of every year..."

— **JOE DONNA**, *PRESIDENT OF CHICAGO BASED SALES CONSULTING FIRM, SALES OXYGEN*



“This book can be read in less than 30 minutes, but the insights these questions provide are timeless. By organizing these laser-focused questions by function, Terry and Dave provide a comprehensive road-map that can be used to completely transform a sales organization. A must-read for any sales leader interested in improving their team’s performance and capturing competitive advantage in their marketplace.”

— **TJ FELICE**, *PRESIDENT, ISODX SOLUTIONS*

“As a consultant to Professional Services organizations, this sector will derive significant insights into how top performing sales efforts are organized and managed. Terry and Dave have created a unique, structured approach that can be applied as a Roadmap to build effective revenue generating models. This “taxonomy” of sales questions will be an effective guide for any business, regardless of industry, to assess their sales model.”

— **DAVID RYAN**, *MANAGING PARTNER, GRAY MATTERS GROUP – CONSULTING FIRM*

“Terry’s and Dave’s insight and experience with sales process transformation is helpfully distilled in this handy and readable book. For experienced and new sales managers, this book should be a required read.”

— **TODD NILSON**, *PRESIDENT, SOCIAL SYNTAX, A CHICAGO-BASED SOCIAL MEDIA STRATEGY CONSULTANCY*



“Like a well-done sales call, it’s not about knowing the answers but knowing what questions to ask. Dave and Terry will spark some much needed brainstorming with **99 Questions to Achieving Your Sales Goals**. Don’t leave this book up on the shelf - keep reading it again and again!”

— **DAVID RENTO**, *DIRECTOR OF NORTH AMERICAN SALES DEVELOPMENT, SGS*

“One of the most important steps in improving sales performance is diagnosing the current state to identify strengths and areas of opportunity. By using **99 Questions to Achieving Your Sales Goals**, sales leaders can focus on the most critical operational areas and more swiftly drive business improvements for employees, customers, and shareholders.”

— **MARCI REYNOLDS**, *DIRECTOR, GLOBAL CUSTOMER OPERATIONS, ACI WORLDWIDE AUTHOR, THEOPERATIONSBLOG.COM*

“Any book written by Terry Walsh gets my attention! I have worked with Terry for several years, and he has consistently helped me think through powerful, breakthrough concepts in sales and sales management. This book is another indication of the out-of-the box thinking so characteristic of Terry. **99 Questions** is a way to encourage the reader to find their way by focusing them on asking the right questions. I loved the book!”

— **KAY ANDERSON**, *PPRESIDENT & CMO, THE EVANSTON GROUP, INC.*



“A true Sales Operations Practitioner, Terry has many years’ experience building and re-building successful sales teams. Partnering with David Falter (Six time CEO), they view sales and marketing as inseparable, and present their knowledge in the form of “spot on” questions that allow readers to quickly grasp the necessary building blocks for high performing sales teams. Simply stated, the answers are in the questions.”

— **DIANE A. TESTA**, *PRESIDENT, KOI CONSULTING GROUP, INC.*

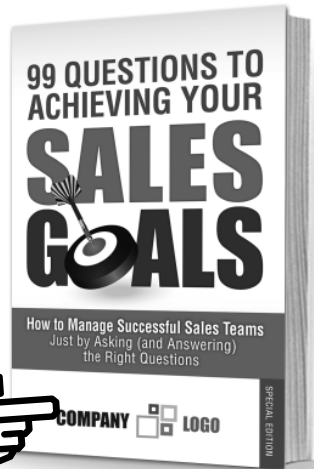
“Asking smart questions significantly increases your probability of getting useful answers. **99 Questions to Achieving Your Sales Goals** will allow you to identify the smart questions critical to achieving the revenue goals of your business. A quick read with some stimulating questions; the answers to which may provide a deeper insight into your sales strategy! ”

— **ADIL F. DALAL**, *CQE, PMP, CERTIFIED LEAN PROFESSIONAL, CERTIFIED EXECUTIVE AND BOARD CERTIFIED COACH, CEO, PINNACLE PROCESS SOLUTIONS, INT’L®.*
Author: *“The 12 Pillars of Project Excellence: A Lean Approach to Improving Project Results”.*



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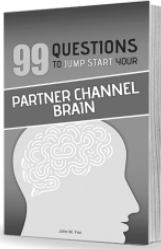
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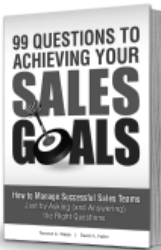


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Terry Walsh

Known as a true sales operations practitioner, Terry helps businesses grow revenue and improve sales productivity by implementing better sales processes and practices.



Dave Falter

Currently a partner in Acorn Growth Partners, Dave has been a private equity executive, and six-time CEO of start-up to Fortune 1000 businesses.