

lean marketing lab

sales and marketing learning community dedicated to the user experience.

[main](#) [media](#) [lean marketing system](#) [lean engagement team](#) [tools](#)

We are **CONNECTING!**



Sales Strategy and Execution

Guest was David Brock

[Sales Strategy and Execution](#)
[Copyright Business901](#)

Sales Strategy and Execution

Note: This is a transcription of an interview. It has not gone through a professional editing process and may contain grammatical errors or incorrect formatting.

Transcription of Interview

Joe: *Welcome everyone. This is Joe Dager, the host of the Business901 Podcast. With me today is David Brock. Dave has spent his career in high-performance organizations like IBM and Textronik. Dave established his company, Partners in Excellence, focused on the customer-facing side of the organization. He works with sales and marketing organizations to effectively and efficiently reach their customers, outperforming and outselling their competition. Dave, I would like to welcome you. I'm a long time favorite of your blog and your comments throughout social media. Thanks for being here.*

Dave: *Well, I'm so flattered that you invited Joe. I've always been following your stuff and been a big fan of yours, so I'm flattered to be part of your podcast series.*

Joe: *I appreciate it. Though you work across the board, I think in performance management, we came here to discuss sales management. And in a broad sense, how does Partners in Excellence participate in that arena or discussion?*

Dave: *Well, I mean typically, our clients are CEO's or EVP's of sales and something like*

that and we really work with them to say having more effectively and more efficiently reach their customers. It could be anywhere from their overall sales deployment strategies down to the nitty-gritty stuff of how do we make sales organizations perform. So most of it is working with sales management in how they drive change in their organizations. So to me, sales managers are probably one of the most underserved populations in kind of the overall sales community. There're thousands of blogs on tips and hints for sales people, but not a whole lot of resource there for sales management.

Joe: *I have a tendency to agree with you. But I think it goes back in most organizations, the edict for a sales person is to increase sales, or maybe a more sophisticated organization will say increase gross profits or something. Is there anything wrong with that approach? I mean is that sales seems to be 90% tactical and only 10% strategy?*

Dave: I worry about the word tactical. I think it's strategy and execution. In fact, the other day, I wrote a blog piece about it but it really is, it's sales, and it's really sales management says what are our strategies, who are we or how do we want to represent ourselves to the customer and how do we most effectively reach them, and then it's the execution of that strategy. So strategy without execution is meaningless, I mean and execution without strategy is just chaos. So these things have to go hand in hand and too often these days, we see too many people just focusing on blind execution. Make a hundred phone calls, go out and meet the customer, and there's nothing behind it, and so sales people are often lost. They do things poorly and so on and so forth. It's really strategy and execution going hand in hand and making sure that we're really trying to achieve the goals in the right way.

Joe: *I work a lot in the SaaS world, and I think you hit a good point there because sales is kind of starting to be more regulated in that world to just another tactic along with SEO and SMO and so forth. Have you seen that? Does that ring a bell when I say that?*

Dave: Yeah and I think it's a lot of kind of, if you look at some of the models of the SaaS companies, a lot of them start with a web presence and some sort of freemium and you hope to convert those guys who are doing a freemium into some level of pay and so on and so forth. Sales has been relegated to a very, very tactical kind of either inbound or outbound. Let me call these guys who've been on our freemium offering for 90 days and let me try and convert them into a higher level of offering and so it becomes very tactically focused. I think in kind of the early ramp and launch of the companies. What you find after some period of time after they've gotten some sort of traction in the market is all of a sudden, they start realizing it's hard to make money one customer at a time. It's hard to call and try and convince Joe Dager to subscribe to this thing at \$55 a month and so on and so forth. And so then they start looking and seeing, there's the enterprise, and there's where you see the transition point.

In virtually every SaaS company, you see them getting much more sophisticated in their thinking of sales, much more strategic in saying whom do we want to go to with our offers? How do we retain and how do we grow those customers? So you see huge sophistication on kind of the enterprise sales side and then critical, huge sophistication on the customer success side, because if you don't retain those subscribers and get them to renew whether it's on an annual basis or a monthly basis, you just don't survive as a SaaS organization.

Joe: *In that SaaS world, we talk about the customer experience, and we talk about sales and support somewhat being intertwined a little bit. The modern day sales manager, how much of a role does he play in support or is that part of his gig, let's say?*

Dave: I think it's always been part of the sales manager's gig or the sales person's gig, whether it's SaaS or traditional kind of products. I think in the SaaS world, in fact, I'm involved with a couple of clients right now where we have this kind of debate of we're seeing a falloff of customer retention, so sales have to get involved because customer success somehow doesn't know what to or doesn't realize that part of their job is selling and retaining customers.

You have these kinds of struggles in the SaaS world around retention, in terms of roles and responsibilities. Whose job is it to acquire the customer? Whose job is it to retain and grow the customer, and cross sell and upsell and all that? A lot of I think the SaaS companies in their rush to growth have kind of forgotten that and then all of a sudden, they start seeing retention problems and sales is called in to be service, support, and problem resolution. I think in general if you step back, in the customer's view, the sales person is the person that they did the deal with. It's the person that convinced them that this was the right solution. It's the first person that they built that relationship with. So naturally when customers have service or support problems, ultimately if they don't see them resolved, they're going to reach out to the guy or the lady that did the original deal with them. Sales I think will always and probably should always have some role in service and support, making sure that the customers are getting what the original value messages were built on.

Joe: *Let's jump into the sales manager, has that role changed significantly? Is there something that you can mention about today's sales manager versus let's say the sales manager of the past?*

Dave: Well I think as with all people; sales managers are time poor. They have too much on their plates to get things done. Over the years that I've been in sales, involved in sales and sales management, is you just see everybody just tremendously pressed for time and not able perhaps to do the right things or invest the time that they need to do. That time pressure that sales managers face and salespeople face, and it's how do we carve out the time to do the appropriate things.

I think another dynamic that I've seen is less and less is being sent in telling the sales manager what their job is and in trying and coaching them, whether it's their managers training and coaching them on what their expectations are. You see a lot of sales people, they've probably been the top performer who just because they're top performer, somehow they've been deemed sales manager and what happens is they may be lousy managers, they aren't coached, they aren't trained, and so you have a lousy manager and you've lost your top performers, so you're caught between a rock and a hard place. I think the issue of training and developing and coaching sales managers is not receiving the attention that I used to see 15 to 20 years ago.

Joe: *I think the sales manager a little bit is becoming more of a coach actually. All managers are somewhat coaches, but I think that there even may be a little more in this area. Are you finding that true?*

Dave: Actually, if I found that true, I'd be ecstatic. Because the most powerful use of the sales manager's time is in coaching their people. What I'm finding sales managers are, are desk jockeys and paper jockeys. They're spending all their time in internal meetings, all their time looking at reports, going over CRM, doing analytical type things without their teams, or focusing on internal meetings within the company about what should we be doing next, how do we drive sales and so on and so forth and they aren't coaching. The biggest thing that we see, the highest leverage of a sales manager's time is coaching their people but too many of them, one, don't know that coaching is part of their job and then two, don't know how to coach.

Joe: *That's interesting that you say that because we think of automation as simplifying things for people and big data simplifying things, but maybe for some managers, some of these sales managers, it really hasn't, has it?*

Dave: I don't think it's so much of an issue of automation. I mean automation is always a double-edged sword. It can help you be tremendously productive and tremendously effective and efficient, or it can allow you to create crap at the speed of light. What happens I think, sales managers, particularly first-line sales managers aren't really told, don't really understand what their job is. And so consequently, they succumb to the day to day pressures and the day to day pressures have to do probably with more sales administration and so on.

A lot of times too because they don't know, doing administration and spending time in internal meetings is a convenient place to hide out. You'd look busy, you're hanging out with

senior managers, you're talking about quasi-important things, and so it gives the image, both to the sales manager and to anybody watching them that they're busy and doing a lot of work. When the difference between being an individual contributor and a sales manager is the only way the sales manager achieves the numbers is by getting things done through their people.

If you look at, my role as a sales manager is to get things done through my people, then what I have to do is say, how do I get each person on my team performing at the highest levels possible? It looks at how do I have my resources deployed, do I have the right people in place, do they have the right skills, tools, capabilities and how do I coach them to develop them to reach the highest levels of performance?

If the sales manager doesn't get that from the very first day they're named as sales manager, if they don't get that their job is to get things done through people, what you do is you see two real things happen. You see, one, they become desk jockeys and hide out doing analysis and internal meetings, or they consider themselves sales super people and what they do is they walk in, push into the customer, push the sales person to the side and do the deal themselves. Either of those behaviors is an ineffective behavior, and ultimately the sales manager and the organization fails if the sales manager defaults to either of those two behaviors. The right thing is, how do I get my people performing at the highest levels?

Joe: *The question that surfaces for me is what does a sales person want from a sales manager?*

Dave: The sales people want somebody that helps them to be effective, somebody that helps them achieve their numbers and somebody that helps them achieve their personal goals of what they want to do through their careers. And sometimes that's just, stay out of my way, but a lot of times or most of the time it helps me solve my problems. Help me figure out how to deal with this very, very complex situation, or help me figure out, I'm struggling with my pipeline, or I'm struggling with prospecting and so on and so forth. Help me figure out how to do that.

I think that the really top performers, even the borderline top performers are looking at how they get better, so they count on their sales manager to help them do that. Whether it's through the coaching they provide, whether it's through the tools, whether it's through some ridealongs and those kinds of things, but they're really looking to say, how do they increase their own effectiveness and how do they get sanity in their own lives? They look to sales managers to help them do that. Sales managers that pop to the top are those guys that do that. The sales managers that people abhor are the desk jockeys, are the ones that are continually pounding you for the numbers but don't create any value.

Joe: *If I'm a sales guy, I want that sales manager to simplify my life, allow me to have more face to face contact with the customer and not for me to fill out more paperwork. I can get more done in front of a customer. Does that transfer up the organization? Is that a hurdle for most companies?*

Dave: Simplifying things is one of the kinds of the pots of gold at the end of the rainbow at every level of management. I think in today's world, both with the rate of change, the fact

that everybody is leaning down, not into the classical sense of lean but leaning down in terms of people and resources, so that everybody is just overwhelmed with work, as I said earlier – time poor.

You have just that one thing, the rate of change has further complications and the inherent drive of people to make things more complicated than they really need to be, I think what we do is we just walk into organizations, and we help them get greater clarity over what they're trying to do and simplify it back down to basic principles and get them focused on those basic principles. I think to the degree that the sales manager can look at what their sales people are doing and help them figure out, how do I get sanity back in my life? How do I start simplifying things? And to me again, it gets back to basic principles and all the way up the food chain, we need to look constantly that we live in very, very complex worlds, but how do we simplify what we do as much as possible? Naturally, that drives huge improvements in productivity, and effectiveness, and efficiency, and in our ability to really do our jobs.

Joe: *I've recognized I have a problem with sales management or as a sales manager, I feel that way. If I call Partners in Excellence, what's the first thing that you do?*

Dave: Well, we spend a lot of time talking to you about one, why you called us and are we the right people to help you out with what you're doing. But typically what happens is, people call with symptoms of the problem that they're facing and they're calling and saying, we aren't getting enough leads or our sales people aren't as effective as they should be, or our pipelines just aren't right, or we need to be able to close more deals, or we need to be able

to grow our business, or cost of selling is sky-rocketing. We go through and talk to people about those symptoms and that pain, and then you start doing things like the 5 Y's or in drilling down a little bit to find what really some of the root issues are.

Sometimes, these organizations are in such pain that the symptoms cloud everything that you're trying to do, so you have to triage that in for the moment to get that pain away so that they can focus on the root issues. I think the problem that we see in the performance of most organizations is this reaction to surface issues.

I was having a discussion with a person last week, is a lot of sales people activity and a lot of sales manager activity looks like bumper cars. We fix the problem, we go along a few minutes, and we bump into another car and that diverts our direction and we bump into another thing and it diverts our direction and so on and so forth. So grounding in basic philosophies or basic principles, this is why I think the strategy is so important. What is it that we're trying to achieve? Where are we going? Why are we going there? How do we want our customers to hold us? If we don't go back to those as we start addressing our performance issues and solving our problems, we end up wandering all over the place and at the end of the year, we find that we're far away from meeting our numbers. Our productivity is way off. We may have exactly the wrong people.

Joe: *What could you leave the audience with about sales management and maybe a few tips that you could give them on how to handle our environment today?*

Dave: I think the first thing that you have to think of is your sales manager at whatever

level. Whether you're the first line sales manager managing individual sales people or you're the top sales executive. Your job is to get things done through your people. That's the only way you get your job done. It's impossible for you to achieve your goals unless your people achieve their goals. If you don't have that as the foundation of everything that you do, every hour that you spend during the day, everything that you think about, getting things done through your people is most critical. Once you have that, then you start looking at what are the levers that I have to really drive performance and getting things done through my people.

The first thing is making sure we have the right talent on board. If we have the wrong people, they may be really good people, but they may be in the wrong job. If we have the wrong people, then we won't be able to get anything done. Do we have the right talent? And then, what am I doing to enable those people to perform as well as possible? First, where are they going? What are they doing and do they understand why? So it's making sure the salespeople really understand the strategy and what we're trying to achieve and the strategy, part of that is how do we want to be perceived by our customers? Then you go from that, and you start looking at what are the systems, the tools, the processes? What is the training and so on and so forth that enables them to be as productive and as effective as possible?

Here's where a lot of the tools, the analytics and things like that can help simplify their lives and help point them in the right direction, much faster than they were able to go in the past. And then finally, it's that coaching. How do we take what they're doing and help them achieve higher levels of performance? How do we sit them and get them to think about how they're approaching the customer or how they're managing their territories or accounts, how they're managing their pipelines and get them to think more effectively about how they improve in

that. So if you again start with, my job is getting things done through people, then everything else falls out of that.

Joe: *I think that's a great comment and one of the things you've mentioned there, every workshop that I've ever put on the sales guys, I can always pick out the sales guys because they were the ones on their smartphones with their head down, typing to somebody. Sales guys were always busy in a workshop. How do you train those guys? These guys, are they trainable and I mean or is it that you got to create this on-the-job type training for them?*

Dave: I think that the view of training has evolved and changed. I mean, you and I are probably trained with a lot of kind of classic butts and seats type training and so on and so forth, where you went and spent three or four days in going through a workshop and then on Monday, you went back and did your job. A lot of that training has been very ineffective, so you have to look at training, how do we train people most appropriately? How do you do – a big fan of 'just in time' training, so a lot of that principle is based on how do I create e-learning experiences.

I think we have to chunk training up quite a bit and make more of it just in time. There's the experiential piece where I think you do need to do things like role plays. The other day, I was actually running a strategy session with a group of senior executives, and we were talking about a major shift in what they wanted their salespeople to do and I said, okay, role play it out. Role play it out to see. If we can't figure what those conversations and what the sales people are going to do, there's no way we can get the sales people to do it. I mean, first that caused fear and consternation but then, just simplifying those things, providing

them the tools and so on.

The other thing and this is something we as a company, you have to embed that ongoing coaching into every training program that you have, and so we always embed coaching the coaches. So coaching the first line sales managers over I'll call it a figurative 30-60-90 Day program, following any training we do, and that's non-negotiable. If people will want us to eliminate that from our bid, thinking that they'll reduce price or so on and so forth, we say, you might as well not spend your money because if your sales managers aren't continuing to coach and develop what the person was supposed to learn, the half-life of that training will be measured in hours or days, not years. If somebody refuses to accept that, we say, don't spend your money; you're wasting it. And with us, that's non-negotiable.

Joe: *I think those are great words of wisdom there Dave. What's upcoming for Partners in Excellence and David Brock?*

Dave: Knock on wood, overwhelmed with some really exciting projects. I mean we actually have the privilege of working with some of the smartest people in the world who face really tough problems. So you know it's working with our clients, we learn a lot, we have a lot of fun, and hopefully we have a huge impact. Coming up in the early spring, I'll be releasing my first book and it's coincidental, it's relevant to this topic, it's *The Sales Manager's Survival Guide*, and this will be the first of a two-book series. This really focuses on the first line sales manager and it focuses on that day that the person is named a sales manager, and what do they do, what's the first action they take through the next 90 days, through the next year, and so on through their life cycle. It's a real pragmatic book, and again that should be coming

out in the very early spring. It will be followed late next year by The Sales Executive Survival Guide, and that really focuses more on the top sales executive and it addresses more issues of strategy, overall sales performance, trends in the sales organization, sales deployment, how the sales organization works with marketing, with the rest of the organization and so on and so forth.

Joe: *I look forward to the book and maybe another podcast out of you.*

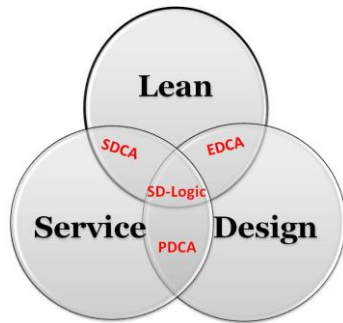
Dave: Absolutely. Anything to promote the book when it comes out.

Joe: *What's the best way for someone to contact you?*

Dave: The best way is through email. It's dabrock@excellenc.com. It looks like the word excellence without the last 'e', so make sure your system doesn't auto-complete that for you. Either that or through Twitter, which is @davidabrock or just pick up the phone and give me a call. My mobile's +1 949 887 9946.

Joe: *I would like to thank you very much, Dave. I will mention you're one of the few Twitter accounts that I always click into the links that you put out there. It's always good stuff, so I encourage people to follow you on Twitter. This podcast will be available on the Business901 iTunes store and the Business901 Website. Thanks again Dave and thanks everyone for listening.*

Dave: Thanks so much. It's a real privilege.



Joseph T. Dager

Business901

Phone: 260-918-0438

Skype: Biz901

Fax: 260-818-2022

Email: jtdager@business901.com

Website: <http://www.business901.com>

Twitter: [@business901](https://twitter.com/business901)

Joe Dager is President of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

[Visit the Lean Marketing Lab:](#) Being part of this community will allow you to interact with like-minded individuals and organizations, purchase related tools, use some free ones and receive feedback from your peers.