

# THE TOP TWENTY MOST IMPORTANT SALES BEST PRACTICES for 2009

What the world's top sales organizations  
are doing **to get ahead and stay ahead**

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- ⊙ What are other sales forces doing to get ahead and stay ahead?
- ⊙ What do the best sales forces do effectively that others don't?
- ⊙ How do you compare?
- ⊙ Where should you invest in 2009 to improve your sales competency?
- ⊙ How do you make anything stick?

**These questions and many more were asked of over 250 companies** in the *2008 Survey of Sales Best Practices* conducted by Jim Dickie and CSO Insights, sponsored by The Complex Sale, Inc.

The survey, based on the sales management book, *Make Winning a Habit: 20 Best Practices of the World's Greatest Sales Forces*, (McGraw-Hill 2006), was designed to assess 37 best practices of the world's greatest sales forces to uncover **1) what sales executives consider the most important practices** and **2) how they are actually performing in each area**. The results provide a scorecard and roadmap to greater sales force effectiveness for direct B2B sales forces.

If you are in sales management and would like to participate in the survey and **receive a free consultation of how you compare**, click [here](#) to go directly to the survey. You can also contact us at [info@complexsale.com](mailto:info@complexsale.com) or call us at 770-360-9299.

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**To see a summary of the results  
of those who were surveyed, read on!**

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# THE SURVEY

The survey focuses on 37 best practices in 20 major categories. Since some areas included multiple best practices (there are over 50 in the book) 37 were chosen for the survey.

## The survey focused on two major questions:

### 1) Which best practices are *most important* to you?

- 5 = Mission critical
- 4 = Very important
- 3 = Useful
- 2 = Nice to have
- 1 = No value

### 2) What is your organization's ability to *consistently* execute this selling skill?

- 4 = World class
- 3 = Very good
- 2 = Needs some improvement
- 1 = Needs significant improvement

Based on those results, **the following is a summary of the top 20 most important sales best practices for 2008, the trends and implications for sales management in 2008, and the further questions they raise.**

**Based on the book**  
*Make Winning*  
**a Habit: 20 Best**  
**Practices of the**  
**World's Greatest**  
**Sales Forces,**  
**the survey**  
**focuses on 37 best**  
**practices in 20**  
**major categories.**

# WHAT THE LEADERS SAY: THE TOP 20 MISSION-CRITICAL ISSUES

## 1. Linking Solutions to Pain

The best practice that was rated highest in importance (93%) was "Effectively linking solutions to buyer pains." Some 54.7% of respondents said that they needed "some" or "significant" improvement in this area. This indicates that there is still a generation of salespeople who don't have the skills to effectively "Discover, Link and Present" 30 years after the advent of consultative selling. It also means that there are still salespeople out there dashing to the demo or "telling" when they have not done effective discovery. This may also indicate a new generation of salespeople needing those skills, a lack of metrics and training adoption in the field resulting in poor coaching and reinforcement, or a process that is just too complicated.

## 2. Creating a Strong Sales Culture

This best practice ranked second in importance with 40.6% of respondents admitting that they need improvement. This indicates a difficulty in selling inside the organization, possibly resulting from either a lack of power and respect of the sales force or a lack of customer/sales focus as a company value from the CEO level. Some corporate cultures don't see sales as a source of shareholder value to leverage; as a result, they treat salespeople as non-strategic.

## 3. Selling to Executives

Almost half of respondents (49.8%) stated that they need improvement in "Getting to high-level executives and having meaningful business conversations." This indicates that companies have moved to selling strategic solutions instead of products and reps are unable to sell to higher levels or companies have not created solutions that are important to strategic buyers.

## 4. Creating Competitive Differentiation

Creating competitive differentiation was the fourth most important practice with 45.4% of respondents saying that they needed some or significant improvement. This could be from a lack of sales skill or a lack of product differentiation in the first place. The only way to differentiate, when there is no other way, is by relationships.

## 5. Including Character in Interviewing

Since trust is essential to relationships, it is not surprising that character ranks high in importance. However, only 29.7% of respondents stated that they need improvement in this important area. Considering the number of sales terminations that are the result of character issues, flaws in trustworthiness must be emerging *after* the interviews (when it is most expensive). It's hard to build trust if the messenger isn't trustworthy.

## 6. Implementing a Formal Skills, Opportunity, and Account Management Training Program

Implementing this type of training program was important, but 43.2% of companies said they needed improvement. The biggest expense any company has is lost sales, but it never hits the books.

## 7. Conducting a Needs Assessment Before Presenting

is related to the first most important practice, "Linking solutions to customer pains." If discovery is not part of the defined process, it's hard to link into the customer pains. Instead, the customers will do it themselves and often get it wrong, or not do it at all, resulting in a stalled sale.

## 8. Political Strategy

Nearly 47% of respondents said that they needed improvement in "Understanding political power and allocating time to win the votes that matter." With multiple buyers working in committees, the skills of Discover, Link, and Present are not enough. You need a strategy to win each key vote (or live without it) or you will spend too much time with people with low power and miss the votes that matter.

## 9. Strategic Value Propositions

At number nine in importance, too many value propositions focus on ROI alone, which will not drive action. Without an emotional pain or gain for a politically powerful sponsor, the ROI will sit on the CFO's desk along with a dozen others.

## 10. Including Support Personnel

The fact that more than 50% of companies need improvement to "Ensure that support personnel consider themselves part of the sales team" shows that either sales is not focused on repeat business or differentiation of service or service does not see themselves as a role player for add-on business. In reality, they are the gateway for repeat business.

## 11. Implementing a Contact Management System

This is the starting point for most companies in sales effectiveness and is basically a minimum requirement. The idea is to get the little black books out of the salespeople's heads and into the corporate database. Approximately half of respondents said they do this well. The other half said they still need help - after millions of dollars have been spent.

## 12. Implementing Skills Training

Some 34.1% of respondents said they needed help in this area, indicated by a large investment in foundational skills development over the past few years. Consultative selling is a fundamental skill set needed for all salespeople. By itself, however, it does not address competition, politics, or strategy and should not be seen as a complete methodology for complex sales.

## 13. Opportunity Management Tools

Over 44% said that they needed improvement in "implementing a widely adopted opportunity management tool," while 76.4% said that it was "very important" or "mission critical." You can win without a strategy - it's called luck.

## 14. Imbed Your Sales Process into Your CRM System

Both salespeople and IT professionals loathe having to get out of the CRM system and into another system to manage opportunities and forecast. Yet most CRM systems simply have a line item forecast grid and do not go deeply enough into competition, politics, stakeholder analysis and strategy. Therefore, a third-party plug-in for the CRM system is usually required to address these strategic areas.

## 15. Implement Tools to Distribute and Update Effective Messaging

Some 76% of respondents said that this was "mission critical" or "important," yet almost 60% said they needed help in this area. Assessing messaging effectiveness, responding to competitive messages and traps, and staying up to date on the latest industry requirements needs a dedicated resource and a knowledge management system to keep messages fresh for the field sales force. This would save salespeople vast amounts of time e-mailing and calling.

## 16. Knowing When to Qualify Out

There is a fine line between quitting and qualifying out. Having a dispassionate, pre-agreed qualification process for further investment of resources can go a long way into taking the emotion out of picking the right battles. The time saved can be spent getting ahead in the deals that you do choose to engage.

## 17. Management Deal Coaching

Almost 75% of respondents said that deal coaching was either "mission critical" or "very important" and yet 57.4% said they needed some or significant improvement. This confirms that sales managers are either "too busy to win" or at least too busy selling themselves to coach their reps. (Or perhaps they don't know how or don't think it's an important part of their job.)

## 18. Performance Reviews Based on Sales Methodology

Over 60% said that their sales methodology was not part of their performance review process, while 73.2% said that it was "important" or "critical." This is why the annual HR performance review is considered non-productive by many sales managers. Performance coaching should be based on sales best practices, which should be based on how your buyers buy and how your competitors compete.

## 19. Implementing a Defined Account Management Process

The first step in account management is to segment your accounts based on their potential. Some you want to maintain, some you want to grow, and some you want to partner with. And each investment segment requires a different account management process or you will invest your time and resources in the wrong accounts or under-invest in your high potential accounts.

## 20. Strategy Reviews

Over two-thirds of respondents said that strategy reviews were "very important" or "mission critical," yet over half said that they needed improvement. Not taking the time to collectively plan results in selling to the wrong people, selling to the wrong accounts, and not controlling the competition, which results in losses and wasted time. When this happens, we don't have time to strategize the next deal. Salespeople often have "happy ears" and need help with assumptions, blind spots and creative strategies. A coached deal has a much better chance of closing than one that is not.

# SURVEY QUESTIONS

SALES EFFECTIVENESS BEST PRACTICE	Mission critical and very important	Need some or significant improvement
Create a strong sales culture where selling skills are recognized and rewarded across the company.	93.0%	57.4%
Effectively link your solutions to buyer's pains.	92.6%	40.6%
Get to high-level executives and have meaningful business conversations.	91.3%	49.8%
Utilize consultative selling skills to create competitive differentiation.	90.0%	45.4%
Specifically assess character and trustworthiness in your interview process.	88.3%	29.7%
Conduct a comprehensive needs assessment before presenting your products or services.	84.7%	43.2%
Implement a formal training program, built on skills and opportunity and account management strategies.	84.6%	50.0%
Ensure that support personnel consider themselves to be part of the sales team.	82.8%	46.9%
Implement a contact management system tracking key individuals in all major accounts.	82.7%	40.7%
Develop value propositions that link strategic value and emotional issues for powerful stakeholders.	82.1%	50.7%
Implement training in detailed skills for needs discovery, problem/solution linkage presenting.	80.1%	51.2%
Involve sales managers in analyzing and coaching on all major deals.	77.6%	34.1%
Implement a widely adopted opportunity management planning tool.	76.4%	44.1%
Embed your sales process into your CRM system to support opportunity management and forecasting/pipeline management.	76.1%	48.2%
Qualify out of deals that you cannot win early in the sale cycle.	76.0%	59.4%
Understand political power and properly allocate time to win the votes that matter.	75.5%	55.9%
Include regular adherence to our sales methodology as a major criteria when conducting performance reviews.	74.2%	57.4%
Implement tools to distribute and update effective messaging, by market segment, to handle objections/competitive traps.	73.2%	61.4%
Conduct detailed account strategy reviews before making major time/resource investments.	70.7%	52.4%
Implement a defined account management process for all major segments of your marketplace.	69.9%	53.4%

# WHAT IS EVERYONE ELSE GOING TO BE DOING IN 2009 TO SELL BETTER?

The final question of the 2008 TCS/CSO Survey was:

**“During the coming year what, if any, sales effectiveness initiatives will your company be undertaking to improve sales performance?”**

Respondents chose three initiatives out of fourteen possibilities.

During the coming year, what, if any, sales effectiveness initiatives will your company be undertaking to improve sales performance? (Select up to three priorities)	
Answer options	First, second, or third priority
Redefine/optimize our sales process.	40.9%
Improve sales rep’s ability to present strategic benefits/value of our solutions.	40.0%
Redefine/optimize our forecasting process.	28.9%
Improve sales rep’s ability to access C-level executives.	25.8%
Redefine/optimize our competitive differentiation strategies.	25.8%
Improve sales rep’s ability to identify/reach people with real power.	25.8%
Redefine/optimize our major account segmentation/management strategies.	24.9%
Improve sales management’s ability to effectively coach reps.	24.4%
Improve adoption of our sales process.	18.7%
Improve adoption of our CRM systems.	17.8%
Improve sales rep’s negotiation skills.	14.7%
Improve ability to bow out of poor deals sooner.	12.4%

**Improving sales processes was the most frequent response** (40.9%), indicating that after years of focusing on process and training, many sales forces are refining or reevaluating their current processes. Many of the major sales forces have initiated some process, either internally built or from a third-party.

Many are now realizing that in order to achieve their full potential, they need more than one sales or training process - they need skills training, account management *and* opportunity strategy processes and what they have addresses only one of those needed areas. Or markets have changed requiring new competencies in selling solutions or moving from transactions to relationships,

Also many executives we have spoken to in researching *Make Winning a Habit* say that adoption of any process has been spotty and that they want a way to make any process “stick” or achieve consistent use. The result is a relaunch or a new process, this time with the metrics and coaching needed to effect discipline.

**The second, fourth and sixth most frequent** initiatives are aimed at building the skills to sell strategic solutions to executives. Many organizations have learned the lessons of the 80's and now moved up the value chain from products to strategic solutions. Many sales executives tell us that the ability of the sales force to sell strategic solutions to executives has not kept pace.

**Political navigation** (25.8%) to get to executives and **strategic literacy** to know what to say when they get there, and **executive presence** to gain credibility, are new competencies for many salespeople.

**Forecasting** (28.9%) in complex sales situations has always been difficult but now it is a boardroom level, shareholder, Sarbanes-Oxley issue. The old 50-70-90 percent method doesn't work since you either win a deal or lose the entire sale. Salespeople are notorious for “happy ears” and managers need new processes for analyzing the political, competitive, and closing strategies of their reps.

At number seven, initiatives to better refine **major account** segmentation and management is being considered by almost a quarter of the respondents.

Finally almost a quarter of the respondents said that **coaching** (24.4%) by sales managers would be an initiative this year. This initiative reflects items 17 and 20 in strategic importance from the survey. Freeing and focusing managers on real strategy coaching rather than flogging the forecast can leverage the management team while increasing win rates and forecast accuracy.

## WHAT'S HOLDING THEM BACK?

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More than 80 percent of respondents cited the above sales practices as “very important” or “mission critical,” but knowing what needs to be done does not always translate into *action*. Our survey found that many organizations struggle to successfully integrate these best practices into their daily selling activities. They know what needs to be done to optimize their sales effectiveness, but have trouble making these improvements a reality.

### So...what is holding them back? **Cost and time.**

**Cost.** A lack of time, resources and money is a common complaint. But consider the cost of doing nothing! Failing to address the issues that impact your sales organization's ability to sell will have a significant impact on the company's top and bottom lines. Lost sales is the biggest expense a company ever incurs.

**Time.** Another common issue cited is time. Sales managers are often too bogged down in the day-to-day challenges of selling to focus on the best practices that can ultimately help them get ahead. We call this the “too busy to win” syndrome and it plagues many sales organizations.

## LAYING THE FOUNDATION

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If you are really committed to improving your sales effectiveness, the first thing to do is get a plan. Don't try to tackle all of the best practices outlined here at once. The most effective initiatives focus on solving a few problems at a time. Start with the following themes:

### **Selling is not just a sales issue.**

In top performing companies, selling is seen as a way to uncover and address the customer's needs. It is a *corporate* objective, not just a sales department objective.

### **Don't forget the basics.**

Basic skills are still the cornerstone to selling. Strong account management, opportunity management, contact management and coaching are key to success.

### **Put the customer first.**

Some 30 years after the advent of consultative selling, many companies have still not mastered the skills needed to get to executive stakeholders and solve their strategic pains. Remaining customer-focused is built into the DNA of world-class sales teams.

**If you are really committed to improving your sales effectiveness, the first thing to do is get a plan.  
Don't try to tackle all of the best practices at once.**

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# THE NEXT STEPS TO SUCCESS: WHAT YOU CAN DO TODAY

## #1) Ask Your Customers.

Find out what is behind your customers' buying decisions. Create a customer advisory board to tell you what you are doing right, what you are doing wrong, and how you can improve. Conduct win/loss reviews. Look at the deals that should have closed but didn't and have someone interview the customer about what happened whether it was a win, loss or "no decision." What did you do right and wrong during the buying process? What did your competitors do? What was the tipping point that made them choose you or choose your competitor? Ask your customers how you can improve. When customers tell you how to improve your products and services, where does this feedback go? Listen to them!

## #2) Ask Your Reps.

Your sales force is an underutilized wealth of knowledge. Salespeople are constantly developing ways to sell value, whether it is through developing a workaround for a functionality shortcoming, creating a technique for differentiating your offerings from the competition, or finding an effective motivator to get prospects to buy now. Find a way to collect ideas, insights and techniques from your reps and make them easily accessible to the sales team.

## #3) Ask Your Partners.

Leverage your partners. Form alliances with companies that can provide you with access to the resources you need to help you optimize your performance. And ask those you help to help you. Ask those businesses that have a vested interest in your success what *they* are doing to optimize *their* performance. This can be a win/win because a growth in your sales means more business for them. Create a way for them to become more strategic to you!

## ABOUT THE COMPLEX SALE, INC.

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Rick Page, author of the #1 sales bestseller *Hope Is Not A Strategy - The 6 Keys to Winning the Complex Sale* as well as *Make Winning a Habit - 20 Best Practices of the World's Greatest Sales Forces*, founded The Complex Sale, Inc. (TCS) in 1992. TCS is a sales methodology and consulting firm with proven approaches for business-to-business complex selling. TCS offers client-tailored training programs and workshops to help companies implement consistent sales processes and methodologies, improve selling skills and competencies, and develop world-class sales managers and leaders. Our approaches are designed to leverage your company's value through a superior sales force. Around the world, we have taught over 50,000 salespeople in hundreds of companies the processes and skills they need to Make Winning a Habit®. Through training and coaching, tools and speeches, to total sales force transformation, **we can help you win the deals that you can't afford to lose.**

For more information, call (770) 360-9299 or visit [www.complexsale.com](http://www.complexsale.com). Please feel free to post this eBook on your blog, email it, or link to it with whomever you believe will benefit from reading it.