



Dear Manager ,

Thank you for subscribing to SalesTrack™. In this document, we help you identify current and chronic obstacles to improved sales performance, show behavioral and skill based trends, your current pipeline (if provided by your salespeople) and suggest coaching and debriefing dialogs. We know the document is quite large and suggest that you use only those parts that are most helpful. This report is for week ending 2/27/2004.

Consistent Performance

One key reason for tracking sales activity is to transform desired behaviors into consistent sales habits. Therefore this weekly report begins with a summary of how consistent your sales force has been over the past four weeks. Consider the diagram below which compares how consistently a salesperson performs an activity versus how consistently that person reaches their activity goals. This allows us to place each person within one of four categories. The ideal position for any salesperson is to carry out their sales activities on a regular basis to a level at or above their goals, represented by quadrant 4 (the upper right).

Salespeople who are consistently trying but not attaining their goals need more coaching and debriefing. Salespeople who are not performing their activities with consistency need to be held more accountable with stronger incentives (or consequences).

Your salespeople's performance in the **first three selling steps** was analyzed **over the past 4 weeks** and positioned in the diagram. Consistent activity means performance to goal was nearly the same throughout the four weeks. Consistent attainment of goals means the performance to goal was above 85% most of the four weeks.

On the following page, you will find each salesperson's results based upon their performance.

CONSISTENT BEHAVIOR		
CONSISTENTLY ATTAINS GOALS	<u>3</u> Reaches Goals But Not Consistently Over Past 4 Weeks	<u>4</u> Consistently Reaches Goals Over Past 4 Weeks
	<u>1</u> Not Reaching Goals And Activity is Inconsistent Over Past 4 Weeks	<u>2</u> Does Not Reach Goals But Demonstrates Consistent Activity
CONSISTENTLY PERFORMS THE SELLING ACTIVITY		

CONSISTENT BEHAVIOR		
Attains Goals	<u>3</u> Reaches Goals But Not Consistently Over Past 4 Weeks	<u>4</u> Consistently Reaches Goals Over Past 4 Weeks
	<u>1</u> Not Reaching Goals And Activity is Inconsistent Over Past 4 Weeks	<u>2</u> Does Not Reach Goals But Demonstrates Consistent Activity
Consistently Performs The Selling Activity		

CONSISTENT BEHAVIOR RATING of YOUR SALES FORCE			
NAME	STEP 1	STEP 2	STEP 3
Salesperson One	3	3	3
Salesperson Two	3	3	3
Salesperson Three	3	1	1
Salesperson Four	4	4	4
Salesperson Five	3	2	2
Salesperson Six	4	4	4
Salesperson Seven	1	1	1
Salesperson Eight	4	4	4
Salesperson Nine	4	4	4

Below you will find the actual performance for each salesperson that was used in the consistency analysis. In some cases there is more behind the results that requires your interpretation. For example, a salesperson might consistently perform the activities in step 1 of their sales cycle but at a very low percentage level. This could mean either the salesperson lacks commitment or the goals are inappropriate. It is up to you to uncover the real issues and manage the sales person's behavior correctly.

Performance Over Past 4 Weeks Reported as % of Goal												
Name	STEP 1				STEP 2				STEP 3			
	4 Weeks Ago	3 Weeks Ago	2 Weeks Ago	Last Week	4 Weeks Ago	3 Weeks Ago	2 Weeks Ago	Last Week	4 Weeks Ago	3 Weeks Ago	2 Weeks Ago	Last Week
Salesperson One	113	127	113	0	113	127	113	0	180	160	140	0
Salesperson Two	140	0	233	147	140	0	233	147	140	0	300	160
Salesperson Three	90	0	90	90	70	0	70	80	80	0	80	80
Salesperson Four	73	153	113	120	73	107	100	107	100	100	120	120
Salesperson Five	90	100	80	80	70	80	60	70	60	60	60	60
Salesperson Six	100	100	100	108	100	100	100	107	150	120	100	160
Salesperson Seven	133	0	67	58	83	0	63	90	70	0	0	80
Salesperson Eight	113	142	120	103	130	220	133	117	150	230	140	130
Salesperson Nine	148	150	90	100	160	140	110	110	175	150	150	125

Weekly Performance To Goal

We thought you'd like to see how each salesperson performed against their goals for the week. The tables below, one for each sales group, show their activity for the 5 steps of their sales cycle. The performance is ranked by performance against the weekly revenue goal.

PERFORMANCE For - EIS NRC REGION 1

Name	Revenue	Suspect Contact Call	Qualifying/Needs Discussion	Qualified Prospect	Verbal/Written Proposal	Close/Sale/Decision
	900%	147%	147%	160%	160%	200%
	592%	120%	107%	120%	100%	200%
	240%	80%	70%	60%	60%	50%
	160%	90%	80%	80%	60%	50%
	0%	0%	0%	0%	0%	0%

PERFORMANCE For - REGION 1 - PHASE 1

Name	Revenue	Suspect Contact Call	Qualifying Call	Qualified Prospect	Proposal	Sale/Close
	375%	100%	110%	125%	100%	200%
	120%	108%	107%	160%	100%	100%
	0%	58%	90%	80%	100%	0%
	0%	103%	117%	130%	60%	0%

Weekly Activity

The following table shows last week's actual activity and ratios for your entire sales force, based on the data they provided. When we analyzed each salesperson's performance for the week, we identified where each had the most difficulty moving their prospects to the next step in the sales cycle. The bottleneck is the area with the poorest ratio performance and is underlined. See the note below the tables below.

Activity For - EIS NRC REGION 1

Name	Revenue	Suspect Contact Call	Qualifying/Needs Discussion	Qualified Prospect	Verbal/Written Proposal	Close/Sale/Decision	Suspect Contact Call to Qualifying/Needs Discussion	Qualifying/Needs Discussion to Qualified Prospect	Qualified Prospect to Verbal/Written Proposal	Verbal/Written Proposal to Close/Sale/Decision
	\$45,000	22	22	8	8	4	100%	36%	100%	50%
	\$29,600	18	16	6	5	4	89%	38%	<u>83%</u>	80%
	\$12,000	8	7	3	3	1	88%	43%	100%	<u>33%</u>
	\$8,000	9	8	4	3	1	89%	50%	<u>75%</u>	33%
	\$0	0	0	0	0	0	0%	0%	0%	0%

Activity For - REGION 1 - PHASE 1

Name	Revenue	Suspect Contact Call	Qualifying Call	Qualified Prospect	Proposal	Sale/Close	Suspect Contact Call to Qualifying Call	Qualifying Call to Qualified Prospect	Qualified Prospect to Proposal	Proposal to Sale/Close
	\$12,000	100	55	25	10	6	55%	45%	<u>40%</u>	60%
	\$1,200	65	32	16	5	2	49%	50%	<u>31%</u>	40%
	\$0	35	27	8	5	0	77%	<u>30%</u>	63%	0%
	\$0	62	35	13	3	0	56%	37%	<u>23%</u>	0%

The "worst" ratio is underlined in red. This is where the salesperson had the most difficulty converting opportunities to the next step in the sales cycle. The expected ratios are determined by the salesperson's goals. The actual ratios are a consequence of their weekly activity. If no ratio is underlined, the salesperson did not submit enough activity. An asterisk denotes that no activity was found for this week.

Monthly Performance To Goal

We also include how each salesperson performed for the past 4 weeks. The performance is ranked by performance against the revenue goal.

PERFORMANCE For - EIS NRC REGION 1

Name	Revenue	Suspect Contact Call	Qualifying/Needs Discussion	Qualified Prospect	Verbal/Written Proposal	Close/Sale/Decision
	330%	88%	70%	60%	50%	50%
	325%	130%	130%	150%	115%	138%
	227%	115%	97%	110%	100%	138%
	110%	68%	55%	60%	35%	38%
	40%	88%	88%	120%	95%	125%

PERFORMANCE For - REGION 1 - PHASE 1

Name	Revenue	Suspect Contact Call	Qualifying Call	Qualified Prospect	Proposal	Sale/Close
	309%	122%	130%	150%	198%	117%
	105%	102%	102%	133%	120%	100%
	0%	65%	59%	38%	45%	0%
	0%	120%	150%	163%	85%	13%

Monthly Activity

The following summarizes last month's actual activity and ratios for your entire sales force, based on the data they provided. When we analyzed each salesperson's performance for the past 4 weeks, we identified where each had the most difficulty moving their prospects to the next step in the sales cycle. The bottleneck is the area with the poorest ratio performance and is underlined.

Activity For - EIS NRC REGION 1

Name	Revenue	Suspect Contact Call	Qualifying/Needs Discussion	Qualified Prospect	Verbal/Written Proposal	Close/Sale/Decision	Suspect Contact Call to Qualifying/Needs Discussion	Qualifying/Needs Discussion to Qualified Prospect	Qualified Prospect to Verbal/Written Proposal	Verbal/Written Proposal to Close/Sale/Decision
	\$66,000	35	28	12	10	4	<u>80%</u>	43%	83%	40%
	\$65,000	78	78	30	23	11	100%	38%	<u>77%</u>	48%
	\$45,300	69	58	22	20	11	<u>84%</u>	38%	91%	55%
	\$22,000	27	22	12	7	3	81%	55%	<u>58%</u>	43%
	\$8,000	53	53	24	19	10	100%	45%	<u>79%</u>	53%

Activity For - REGION 1 - PHASE 1

Name	Revenue	Suspect Contact Call	Qualifying Call	Qualified Prospect	Proposal	Sale/Close	Suspect Contact Call to Qualifying Call	Qualifying Call to Qualified Prospect	Qualified Prospect to Proposal	Proposal to Sale/Close
	\$39,500	488	260	120	79	14	53%	46%	66%	<u>18%</u>
	\$4,200	245	122	53	24	8	50%	43%	45%	<u>33%</u>
	\$0	155	71	15	9	0	46%	<u>21%</u>	60%	0%
	\$0	287	180	65	17	1	63%	36%	26%	<u>6%</u>

Quarterly Performance To Goal

We also include how each salesperson performed for the past 13 weeks. The performance is ranked by performance against the revenue goal.

PERFORMANCE For - EIS NRC REGION 1

Name	Revenue	Suspect Contact Call	Qualifying/Needs Discussion	Qualified Prospect	Verbal/Written Proposal	Close/Sale/Decision
	174%	75%	81%	103%	88%	119%
	148%	40%	33%	39%	34%	30%
	99%	59%	57%	71%	63%	88%
	53%	48%	39%	41%	26%	27%
	28%	64%	71%	103%	72%	119%

PERFORMANCE For - REGION 1 - PHASE 1

Name	Revenue	Suspect Contact Call	Qualifying Call	Qualified Prospect	Proposal	Sale/Close
	408%	72%	71%	87%	71%	77%
	308%	98%	109%	113%	129%	69%
	45%	98%	115%	155%	85%	9%
	0%	20%	18%	12%	14%	0%

Quarterly Activity

Below is the rolling quarter's activity and ratios for your entire sales force, based on the data they provided. We analyzed each salesperson's performance and identified where each had the most difficulty moving their prospects to the next step in the sales cycle. The bottleneck is the area with the poorest ratio and is underlined.

Activity For - EIS NRC REGION 1

Name	Revenue	Suspect Contact Call	Qualifying/Needs Discussion	Qualified Prospect	Verbal/Written Proposal	Close/Sale/Decision	Suspect Contact Call to Qualifying/Needs Discussion	Qualifying/Needs Discussion to Qualified Prospect	Qualified Prospect to Verbal/Written Proposal	Verbal/Written Proposal to Close/Sale/Decision
	\$106,000	179	171	72	57	31	96%	42%	<u>79%</u>	54%
	\$96,100	72	49	27	22	8	<u>68%</u>	55%	81%	36%
	\$61,400	142	119	50	41	23	84%	42%	<u>82%</u>	56%
	\$33,200	94	61	29	17	7	65%	48%	<u>59%</u>	41%
	\$17,600	153	149	72	47	31	97%	48%	<u>65%</u>	66%

Activity For - REGION 1 - PHASE 1

Name	Revenue	Suspect Contact Call	Qualifying Call	Qualified Prospect	Proposal	Sale/Close	Suspect Contact Call to Qualifying Call	Qualifying Call to Qualified Prospect	Qualified Prospect to Proposal	Proposal to Sale/Close
	\$128,000	1,280	710	295	168	27	55%	42%	57%	<u>16%</u>
	\$53,000	565	277	113	46	20	49%	41%	<u>41%</u>	43%
	\$5,000	650	378	171	47	2	58%	45%	27%	<u>4%</u>
	\$0	155	71	15	9	0	46%	<u>21%</u>	60%	0%

CORE COMPETENCY DEVELOPMENT

We would like to recommend some specific areas where development will benefit your salespeople. The table below lists each of your salespeople and the Core Competencies that can affect their performance. Focus your development on the competency with the lowest rating.

NAME	Has Written Goals	Follows written goals with plan	Has Positive Attitude	Takes Responsibility	Strong Self-Confidence	Supportive Record Collection	Controls Emotions	Doesn't Need Approval	Recovers From Rejection	Comfortable Talking About Money	Supportive Buy Cycle	Consistent Effective Prospecting	Reaches Decision Makers	Effective Listening and Questioning	Early Bonding and Rapport	Uncovering Actual Budgets	Discovering Why Prospects Buy	Qualifies Proposals & Quotes	Gets Commitments and Decisions	Strong Desire for Success	Strong Commitment for Success
EIS NRC Region 1																					
		0								0						0	0	0			
						10	0	0	0		0								0	0	0
		2								0						0	0	0			
Region 1 - Phase 1																					
	0									0						0	0	0			
	0									0						0	0	0			
	0					0	0	0			0		0	0							0
	0								0							0	0	0			

Potential core competencies for development related to the sales step where the salesperson was least effective are indicated by a number in a core competency column. Each number represents the current RATING (0-10) for the salesperson based upon the data you entered on the web site. Focus development for each person on the core competency with the lowest rating

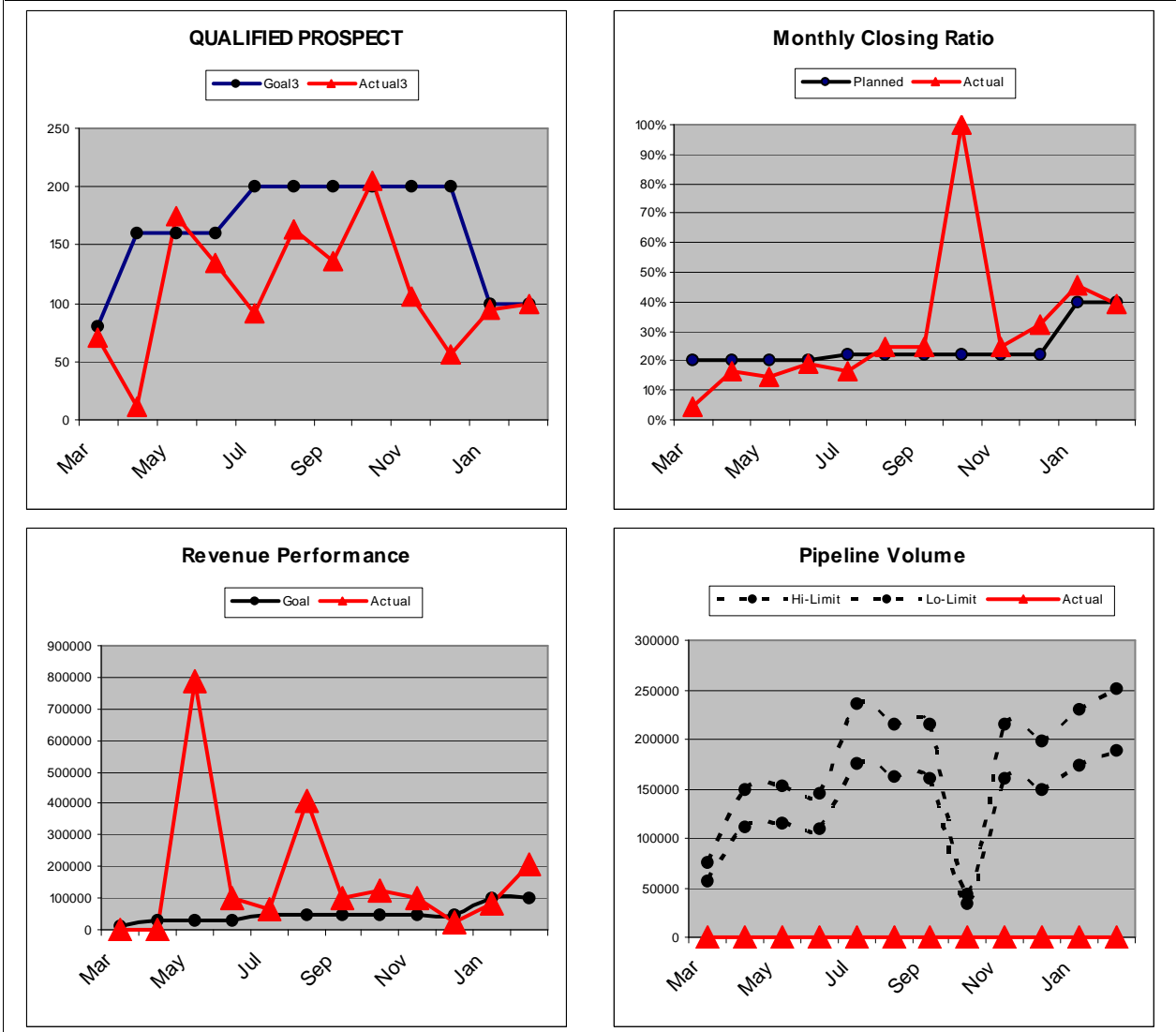
Since we cannot precisely determine which attribute in each competency is most appropriate for development, we recommend that you use your experience with each salesperson to select the one to work on. You can log on to www.omgsalestrack.com and obtain a development plan by clicking on the "View Development Plan" button.

CORE COMPETENCY RATINGS

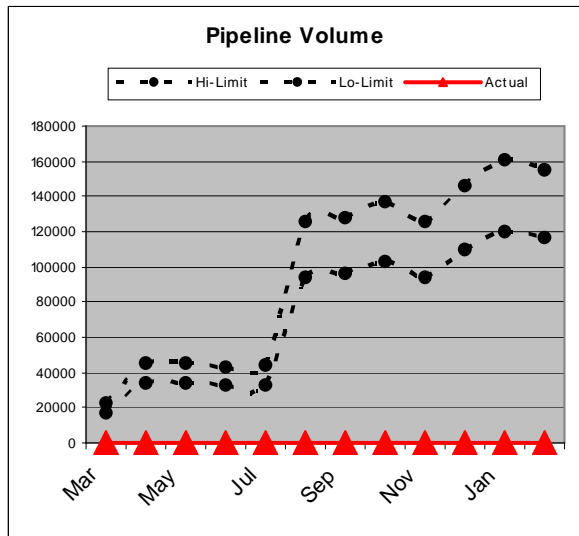
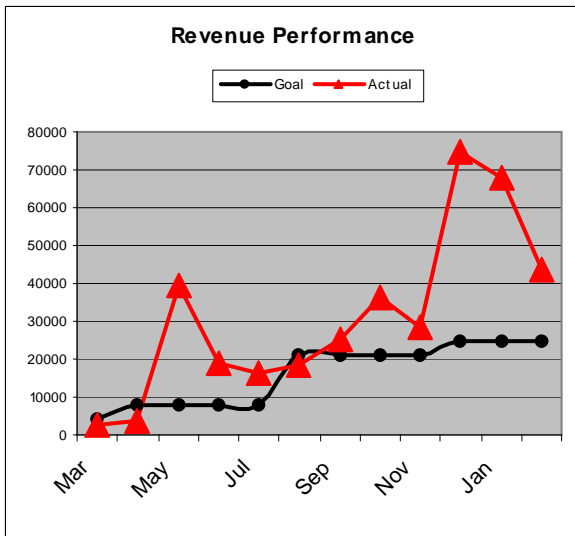
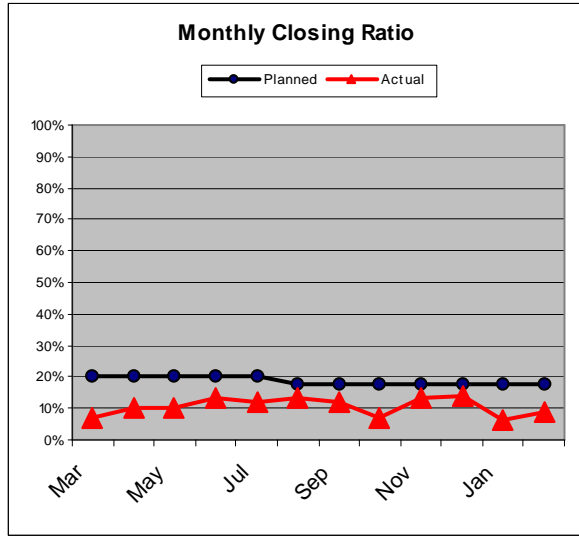
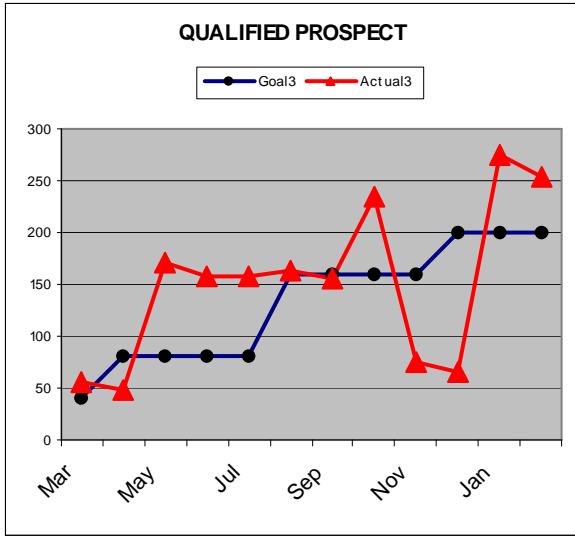
Here is a summary of each salesperson’s development (Core Competency Ratings). The ratings are weighted and combined into a single rating called the Sales Quotient. Each salesperson’s sales quotient is indicated to the right of the 21 competencies.

NAME	Has Written Goals	Follows written goals with plan	Has Positive Attitude	Takes Responsibility	Strong Self-Confidence	Supportive Record Collection	Controls Emotions	Doesn't Need Approval	Recovers From Rejection	Comfortable Talking About Money	Supportive Buy Cycle	Consistent Effective Prospecting	Reaches Decision Makers	Effective Listening and Questioning	Early Bonding and Rapport	Uncovering Actual Budgets	Discovering Why Prospects Buy	Qualifies Proposals & Quotes	Gets Commitments and Decisions	Strong Desire for Success	Strong Commitment for Success	SALES QUOTIENT
EIS NRC Region 1																						
	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14
	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14
	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14
	10	2	9	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	27
	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14
Region 1 - Phase 1																						
	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14
	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14
	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14
	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14

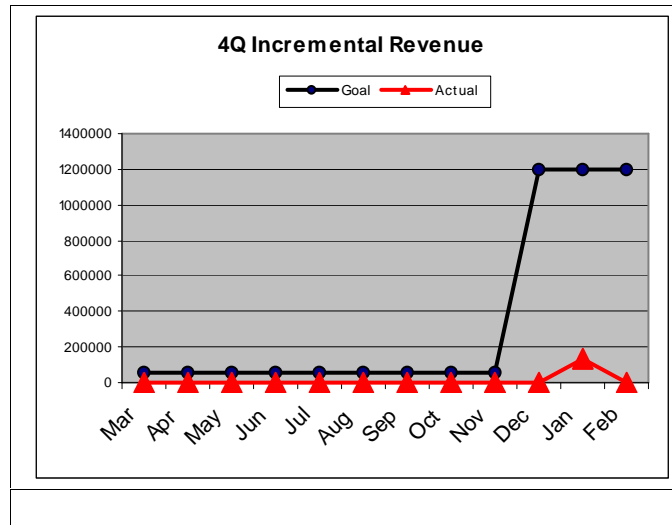
PERFORMANCE HISTORY - EIS NRC REGION 1



PERFORMANCE HISTORY - REGION 1 - PHASE 1



ADDITIONAL ACTIVITY HISTORY - EIS NRC REGION 1



SALES CYCLE STEPS TARGETED FOR IMPROVEMENT

If you improve a salesperson’s poorest conversion of one step of the sales cycle to the next, you will improve the overall results. We analyzed the activity for each salesperson and in the first table below we identify the steps in the sales cycle where conversion most needs improvement. The lack of any recommendations is normally due to insufficient weekly information. Also if the poorest conversion is actually zero percent, then no expected improvement can be determined.

Sales Cycle Improvement (based on previous 4 weeks)				
Name	Area For Improvement	Ratio		Expected Improvement
		Actual	Goal	
EIS NRC Region 1				
	Proposal	77%	100%	30%
	Discussion	84%	100%	19%
	Discussion	80%	100%	25%
	Proposal	58%	100%	71%
	Proposal	79%	100%	26%
Region 1 - Phase 1				
	Proposal to Sale/Close	18%	30%	69%
	Proposal to Sale/Close	33%	40%	20%
	Qualifying Call to Qualified Prospect	21%	33%	58%
	Proposal to Sale/Close	6%	40%	580%

PERFORMANCE IMPACT

The table below demonstrates the effect on your bottom line performance if this weakness was overcome throughout your sales organization.

Performance Impact From Improved Sales Ratios				
EIS NRC Region 1	Future Monthly Performance			
	No Improvement		Improve Ratios	
Basis for Future Performance	\$Rev	% of Goal	\$Rev	% of Goal
Last Week's Data	\$94,600	378%	\$105,587	422%
Previous 4 Week's Data	\$206,300	206%	\$268,994	269%
Previous 13 Week's Data (Quarter)	\$314,300	101%	\$389,160	125%

Performance Impact From Improved Sales Ratios				
Region 1 - Phase 1	Future Monthly Performance			
	No Improvement		Improve Ratios	
Basis for Future Performance	\$Rev	% of Goal	\$Rev	% of Goal
Last Week's Data	\$13,200	213%	\$16,920	273%
Previous 4 Week's Data	\$43,700	176%	\$71,908	290%
Previous 13 Week's Data (Quarter)	\$186,000	237%	\$351,031	447%

DEBRIEFING SUPPORT

To assist you when you debrief your salespeople, we include below some tips and questions focused on the appropriate areas of your sales cycle in which your salespeople could improve.

DEBRIEFING NOTE

To help your salespeople improve their performance, you must debrief them regularly - at least once per week and preferably, on a daily basis. Debriefing consists of identifying two sales calls - one that went well and one that didn't. You will help the salesperson learn why a call went the way it did by starting with the outcome and asking questions like:

Why did you get this outcome?

What did you do that caused the outcome?

What could you have done differently that might have effected the outcome?

What would have happened if you had done that?

Why didn't you?

You can also debrief the steps of the sales cycle. We have provided some questions you can ask your salespeople if they are having problems with their conversion ratios from one step of the sales cycle to another.

Debriefing For EIS NRC Region 1

Debriefing Questions For: Suspect Contact Call to Qualifying/Needs Discussion

Salespeople who would benefit: Salesperson Q, Salesperson R

If you are having difficulty reaching your prospect, you may wish to provide LESS information. The more you tell the gatekeeper, the more reason he/she has to prevent you from speaking to your prospect.

If the person you are attempting to reach is repeatedly unavailable, try during non-business hours. The gatekeeper may not be protecting your prospect at these alternate times.

There may be a problem with your tonality. You may sound too much like a salesperson, or you may be speaking too quickly, too slowly or too abrasively. Record your calls and perhaps you can hear the problem.

You may be using words like:

"Good morning, afternoon or evening" Use the more informal, "Hi. Is _____ there?" In other words, if you sound more like your prospect's friend and less like a salesperson, you are more likely to get through.

If you are asked to "call back" (for phone attempts only) you may wish to ask whether the prospect will actually take your call at that time. This could save you from wasting your time later.

Debriefing Questions For: Qualified Prospect to Verbal/Written Proposal

Salespeople who would benefit: Salesperson S, Salesperson X, Salesperson Y

Positioning yourself early in the conversation is crucial to moving the process forward. What is the prospect's impression of you ten minutes into the call? You may still be providing too much information in this portion of the process. Learn as much as you can about the prospect's problem, the cost of the problem, the reason for the problem and the consequences of not fixing the problem. You may not be learning enough about the competition to disqualify them. Find out what they like AND what they don't like about them. Are you getting the prospect to describe the relationship he/she would like to have with us should you move forward?

Debriefing For Region 1 - Phase 1

Debriefing Questions For: Qualifying Call to Qualified Prospect

Salespeople who would benefit: Salesperson Z

Tonality is real important in this step. The prospect won't want to move forward if talking with you is not an enjoyable experience. Establish rapport by sounding warm, sensitive to their time and responsibilities and asking relevant questions. You may be providing too much information. Your goal is to just find a problem you can solve. If the prospect is not interested, don't fight. Acknowledge the disinterest and ask something like, "there must be a reason." If the prospect asks you to call back ask some form of "why do you want me to do that?" If they wish to book an appointment, you can more easily do that now while you're both on the phone. If it's a bad time, make sure you aren't taking a put-off. Don't give the prospect your reasons for moving forward. Ask what they would hope to accomplish in the next step or meeting.

Debriefing Questions For: Qualified Prospect to Proposal

Salespeople who would benefit: Salesperson A, Salesperson B, Salesperson C

Positioning yourself early in the conversation is crucial to moving the process forward. What is the prospect's impression of you ten minutes into the call? You may still be providing too much information in this portion of the process. Learn as much as you can about the prospect's problem, the cost of the problem, the reason for the problem and the consequences of not fixing the problem.

You may not be learning enough about the competition to disqualify them. Find out what they like AND what they don't like about them.
Are you getting the prospect to describe the relationship he/she would like to have with us should you move forward?

ISSUES AND THEIR FREQUENCY (1 – 22)

We summarize below what issues exist as indicated in your sales organization's activity. We list an individual's name in the appropriate timeframe where the issue (week, month, quarter) applies.

Performance Topic	This Week	Past Month	Past Quarter
1 Not Enough Activity	X	X, Y	X, Y, Z, A
2 Taking Put Offs in Step 2			
3 Taking Put Offs in Step 3			
4 Taking Put Offs in Step 5			
5 Taking Put Offs Throughout the Sales Cycle			
6 Lack of Risk Taking			
7 Getting Decisions in Step 2 (No's)	X	X	
8 Getting Decisions in Step 3 (No's)			
9 Getting Decisions in Step 5 (No's)			
10 No's Throughout the Sales Cycle			
11 Not Enough New Prospects in Step 2	X	X, Y	X, Y
12 Not Enough New Prospects in Step 3	X	X	X
13 No Activity	X		
14 Short of Goal			
15 Lack of Successes			
16 Congratulation on Lack of Put Offs			
17 Think it Overs in Step 5			X
18 Taking Put Offs in Step 3	X	X	X
19 Allowing Prospects to Build Consensus			
20 Vulnerable to the "call later" in Step 5			
21 Vulnerable to the "call later" in Step 2	X	X	X
22 Vulnerable to the "I'm Busy" in Step 5		X	X

ISSUES AND THEIR FREQUENCY (23 – 44)

We summarize below what issues exist as indicated in your sales organization's activity. We list an individual's name in the appropriate timeframe where the issue (week, month, quarter) applies.

	Performance Topic	This Week	Past Month	Past Quarter
23	Vulnerable to the "I'm Busy" in Step 2			
24	Vulnerable to the "I'm Busy" in Step 3		X	X
25	Willing to "call next week/month" Step 5		X	
26	Talking with the Wrong People			
27	Having Trouble Reaching the Prospect			
28	Leaving Too Many Messages		X, Y	X, Y
29	Sending Literature			X
30	Vulnerable to the "Not Interested" in Step 3			
31	Price Objections			
32	Limited Success			
33	Unexpected Success		X	X, Y
34	Mediocre Performance	X, Y	X, Y	X, Y, Z
35	Just Missed Reaching Goals			
36	Prospects Aren't Interested			
37	Vulnerable to the I'm Busy Put Off in Step 3			
38	Reaching the Wrong Person			
39	Prospects Doing it In House			
40	Prospects Are Happy		X	
41	Prospects Don't Need It			
42	Prospects Not Interested at Closing Time			
43	Doesn't Meet the Prospect's Needs			
44	Allowing Prospects to Think it Over			X

BRIEF EXPLANATION OF THE ISSUES

The coaching related to the issues is provided below for each issue that surfaced within your sales organization's activity.

There's Not Much To Look At Here (Issue 1)

Salesperson succeeded in getting prospects to make decisions but failed to reach all of the goals for the week. This is undoubtedly due to lack of effort on the salesperson's part. Did the salesperson do everything possible to reach the goals you assigned? If not, were the goals unrealistic?

Getting Decisions in Step 2 (Issue 7)

While getting "no's" in step 2 is acceptable and preferable to taking put offs, the large percentage of "no's" indicates that the salesperson may not be putting up much of a fight. We think the salesperson needs to become more effective in this step of the process. Have the salesperson ask something like, "there must be a reason you feel this way" or "can I ask you why you're not interested?"

I Like These People (Issue 11)

Since most of the salesperson's activity in step 2 was with existing prospects, it appears that the salesperson is only putting forth an effort on prospects with whom the salesperson is comfortable. While this could achieve a short term goal, it will not help the salesperson achieve any long term goals. Remind your salesperson that sales is not a profession for staying within his/her comfort zone. Have your salesperson stretch it out and make more calls to prospects he/she has never spoken with before. It's not hard, just less comfortable.

I Already Know These People (Issue 12)

Since most of the activity in step 3 was with existing prospects, it appears that the salesperson is only putting forth an effort on prospects with whom the salesperson is comfortable. While this could achieve a short term goal, it will not help you achieve any long term goals. While this could achieve a short term goal, it will not help the salesperson achieve any long term goals. Remind your salesperson that sales is not a profession for staying within his/her comfort zone. Have your salesperson stretch it out and make more calls to prospects he/she has never spoken with before. It's not hard, just less comfortable.

Somebody Didn't Do What They Were Supposed To (Issue 13)

It appears that the salesperson failed to reach the goals during this period because there wasn't any effort put forth. While this could happen because of vacation or sickness, repeated occurrences will prevent the salesperson from reaching your goals.

Your Calendar Must Be Filling Up (Issue 18)

The prospect is asking the salesperson to call back before agreeing to proceed. If the salesperson can learn to stop taking this put off the salesperson will experience much greater success. The salesperson should encourage prospects to say 'no' if they can't say 'yes'. If they were interested in meeting with your salesperson and asked him/her to call back to schedule an appointment, just

have your salesperson ask them to take out their calendar for 'next month' because he/she couldn't possibly meet with them before that anyway. If their request for your salesperson to call back takes place prior to having a conversation about how he/she might be able to help them, have your salesperson tell them that he/she would be happy to call back but you doesn't want to waste their time. If they really don't want to speak with your salesperson, that's OK, but they should tell him/her. If they do want to speak, let's book a time to do that so that we aren't wasting time trading phone calls.

Reach Out and Contact (Issue 21)

The prospect is asking the salesperson to call back before agreeing to proceed. If the salesperson can learn to stop taking this put off the salesperson will experience much greater success. The salesperson should encourage prospects to say 'no' if they can't say 'yes'. That might sound like, "I'd be happy to call back but I don't want to waste your time or mine. If you don't want to talk with me or you don't think this is important, it's OK to say 'no' right now." If they still want to talk, have them take out their calendar for the return call.

Too Busy to Decide (Issue 22)

The salesperson's prospects have been too busy to make a decision and this is preventing the salesperson from reaching closure. Encourage your salesperson to have the prospect say 'no' to if they can't say 'yes' and in the future, get the prospects to agree in advance that they'll make a decision. That sounds like, "I know you're busy, I am too, and neither of us is happy about me haunting you. If you don't want my help just say so and I'll go away!" If they do want to talk, have them take out their calendar and book a time for the next conversation.

Busy as a Bee (Issue 24)

The prospects have been too busy to discuss their issues with your salesperson and this is preventing the salesperson from building a pipeline. Encourage your salesperson to have the prospect say 'no' to if they can't say 'yes'. Recognize a put off for what it is and don't allow your salesperson to waste time trying to reach people who won't talk with him/her. For the prospect who claims to be interested but is still too busy, have them ask, "you must eat!" Have them book breakfast or lunch - even if it's sandwiches over the phone.

Too Busy to Buy (Issue 25)

The salesperson's prospects have been too busy to make a decision and this is preventing the salesperson from reaching closure. Encourage your salesperson to have the prospect say 'no' to if they can't say 'yes' and in the future, get the prospects to agree in advance that they'll make a decision. That sounds like, "I know you're busy, I am too, and neither of us is happy about me haunting you. If you don't want my help just say so and I'll go away!" If they do want to talk, have them take out their calendar and book a time for the next conversation.

What's the Message Here? (Issue 28)

Your salesperson has had too much difficulty getting past the gatekeeper so the problem is either in his/her tonality or in the message. Have your salesperson be more friendly and less business like while only providing his/her name - not the company and the reason for the call. If your salesperson is leaving a message, in the friendliest manner possible have him/her say, "Hi, Dave, it's John Smith. Sorry I missed you. You can reach me at 555-555-5555. Talk with you soon!"

More Effective Than Planned (Issue 33)

The salesperson exceeded the goals for step 3 despite falling short in steps 1 and 2. This indicates more effective selling but less than ideal effort on the activity side. Perhaps your salesperson's goals should be changed for step 1 and 2. If your salesperson demonstrates greater commitment to reaching your step 1 and 2 goals each week the revenue goal would likely be exceeded.

Why Settle for Mediocre Performance? (Issue 34)

The performance was close to successful, but it is important to reach all of the goals in all of the steps. Why accept performance that is "almost" good enough when only "good enough" will do. It's time to demand the relatively small extra effort for your salespeople to reach all of their goals. Now's not the time to accept mediocrity.

Happy Times (Issue 40)

Your salesperson has been talking with prospects who are happy with either who they are using, how they are doing it or what they are buying. And of course, you know that they may not be as happy as they would if they were your customers. But how can your salesperson convince them? Make a list of five scenarios that you know they would benefit from if they were your customer and that you believe they aren't getting by doing business with somebody else. The next time the prospect says that they are happy, have your salesperson tell them something like, "that's great. So scenario 1 must be true." The prospect responds and you can say "scenario two must be true", etc. After going through five scenarios, it is likely that they won't be able to agree that all five are true and your salesperson will have an opportunity to sell off of the problems you will have uncovered.

We hope you find this information helpful.

Sincerely,

Your Sales Development Team