SANDLER®

8 Fundamentals for Building a Scalable Sales Model

Many sales leaders claim they are eager to build a scalable sales model positioned for growth – **a model that will allow them to ramp up revenue dramatically, without causing stress.** Is that even possible? The answer is yes ... if you have the right processes in place. How do you make sure that happens? Here are eight ideas we are sharing with our clients.

01

Make scaling a strategic planning priority ... right now.

2022 looks to be a great year to make scaling sales success a reality at the organizational level. Many of us have finally recovered from the gaps in revenue performance we experienced in 2020 and 2021, so the goal should be to keep that momentum going by making revenue production a major priority. That means setting up or refining processes now that make rapid revenue growth both predictable and sustainable. **Begin by changing some familiar behavior patterns and challenging some old assumptions**, so you can create an entirely new plan – one that sets up you, your team, and your organization up for a breakthrough year. Read on.

02

Look closely at the buyer's journey.

We want to make sure that our strategy for engaging with a prospective buyer matches the buyer journey they follow, transitioning from lead to prospect to client/customer. All too often, the real-world journey the buyer makes is never closely examined, or if it is, it's not synchronized with the sales process. **When was the last time you took a close look at all the touch points that a prospective buyer experiences from the moment they consider your offering to the moment they decide to buy?** We are all busy. We all have fires to put out. But there are priorities, such as validating the buyer journey. Look carefully at all the steps someone must go through to work with you. You may find places where you are not meeting and exceeding the expectations of buyers.

Commit the resources necessary to optimize this journey – and then design your sales process around it. Most organizations skip or minimize this strategically essential step, which means they are setting up a needless obstacle to scaling their revenue performance.

03

Make sure the roles are collaborative.

Specifically, make sure that the interactions within your organization are seamless when it comes to process and handoff. So, for example, if you've got a Sales Development Representative (SDR) group, the members of that group will typically hand off a potential prospect to another team, such as the account executive team, and then finally the customer success team. It's important to remember that, in your customer's eyes, each of these teams is your organization's brand. **If the teams are not collaborating effectively, and not sharing essential information, you cannot expect to scale.**

It's shocking how many times there are disconnects between SDR calls and the next group in the sales process. If the next group doesn't even look at the notes taken on the call from the SDR, we need to fix that. If there is a disconnect between pre-sales and sales, or a disconnect between sales and customer success, we need to fix that, too. This is a widespread problem, and it often shows up at very successful organizations. That means we're making money despite our inefficiencies. As we move forward, we need to become tighter and more scientific in the processes we use to pass information along from one group to another.

04

Set your exit criteria.

Do you manage your business based on the exit criteria? Do your salespeople know the specific, nonnegotiable criteria for moving an opportunity out of one stage of the sales process and into the next stage? They should. This is particularly important in complex sales involving different levels of decisionmakers and influencers. **To achieve good sales funnel hygiene, you want to have in place exit criteria that cannot possibly be misunderstood** as the members of your sales team move from one part of the sales process to the next. Less is more: don't overburden them with 60 exit criteria. Instead, keep the criteria to a reasonable number. And do make sure all the right critexria for advancement have been met before opportunities move to the next stage. The salesperson needs to sell you on the proposition that it is okay to proceed! And by the way, that conversation should be rare.

If it isn't, you have the wrong exit criteria. You can create the necessary tools to help your sales force get the information they need; you can coach and train on exit criteria. It takes management courage to set and enforce these standards, but once you show that courage, you will help both the sales team and the customer make the best decision about whether it makes sense to progress to the next step. This is, again, something most organizations overlook, but it's one of the most important things you can do as a sales leader. If you get this right, and systematize it, efficiency increases dramatically, and scaling revenue growth becomes much, much easier.

05

Set up a client advisory board.

If there's anything the past few years have taught us, it's that market conditions can change in a heartbeat. Guess what? It's our job to make sure we're up to speed with the changing environment our customers are facing – and even staying ahead of the changes that are showing up in their world. The best way to do that, and the best way to create raving fans, is to set up a client advisory board. **Ask your top customers to meet with you as a group from time to time** so they can share information on how you could improve and where they see important issues coming up in the future. You want to always be skating toward where the puck is going, rather than chasing where it's been; that's what client advisory boards allow you to do. They also strengthen important relationships and provide a vitally important communication channel that helps to keep you current on what's likely to happen next in those relationships, up to and including future business opportunities. This is an essential step for senior leaders who aim to scale their revenue production.

06

Tap into what motivates the individual contributor.

Obviously, money is a motivator, but only insofar as it makes good outcomes possible. There are many different things that motivate an individual. Do we know what the most important of these are for each member of our team? It's crucial for sales leaders at all levels to **identify what uniquely motivates each individual performer reporting to them**, and then to find a way to tap into that. Many sales leaders do not even consider this to be part of their job description, but if you're serious about scaling revenue, you will make a point of making it a part of what every sales team leader does. People will always work harder for their own goals than they will for your team quota. Simply ask the salesperson: "Assuming you hit your numbers, what would you do with the commissions/bonus money? What are some of the twwhings you're saving up for or that you want to invest in?" You want to hear about things like weddings and vacation homes and retirement and taking care of family members. That's what's motivating them, so that's what matters. What you want is quota attainment; when you tie that to what's in it for them, magic happens. **Make it about what they want!** This simple, repeatable process – bridging their personal goals with your corporate quota goals – is too often overlooked. It can transform your team and your organization.

07
Set your exit criteria.

You also want to make sure that you're continually touching base with your people. I know: all of us are Zoomed out. But leaders have a special responsibility, especially in today's environment, and the reality is that there are more jobs than there are people looking for jobs. That means organizations are scrambling to find good people, and we're paying much more for human resources services than we ever have in the past.

Let's be realistic: everybody wants your top producers. No one is going after your low producers. So be sure to **engage your people**, and particularly your top people. **Ask them for their opinions. Get their feedback. Give them advance notice about big changes that are on the horizon.** When you ask them to do something, don't just say what you want them to do; say why you're asking them to do it. This way of interacting with your team members will go a long way toward protecting and nurturing your most important relationships, and it will also keep your turnover numbers down.

08
Keep your talent pipeline full.

It's your sales team's job to keep the revenue pipeline full. It's your job to keep the talent pipeline full. Ask yourself: **How deep is your list of qualified people who could work for your organization? How often do you communicate with those people?** Remember, the time to look is not when you have a gaping hole. It's before that hole appears. Be ready just in case you get that surprise call telling you that someone stumbled across an opportunity they just can't pass up. That call should not be a revenue crisis. Remember: every sales leader in your organization is responsible for talent development. Make sure they are coached – and compensated – accordingly.
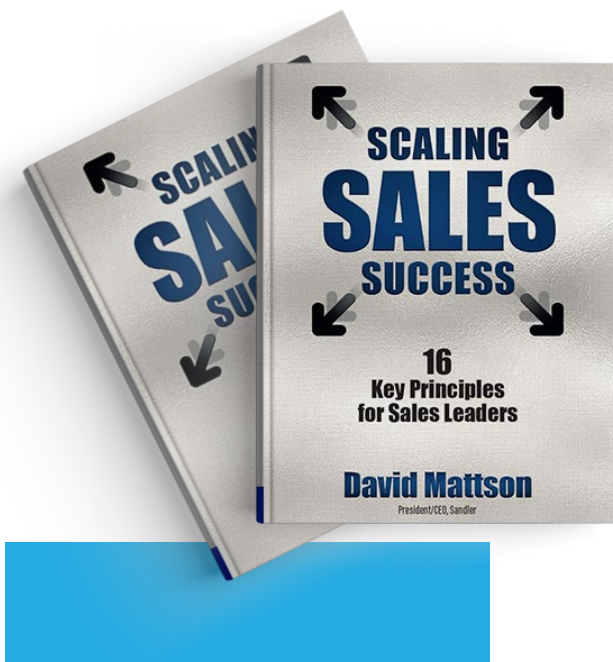
Take the next step.

For more information on how to scale revenue growth, grab your copy of the book, Scaling Sales Success.

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