

THE ANATOMY OF A WORLD-CLASS SALES OPERATIONS ORGANIZATION (VERSION 1.0)

1

Chief of Staff to the Sales Organization

We are the trusted advisor to the CSO. We utilize our seat at the sales leadership table to proactively identify opportunities for sales performance improvement and collaborate effectively/negotiate with other functions.

Impact

1	2	3	4	5
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Effectiveness

1	2	3	4	5
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2

Stewardship of Sales Force Capacity

We acknowledge sales time as a scarce resource and, accordingly, actively manage access to the sales force. All requests for sales force time must pass a necessary Return-on-Investment hurdle and are sequenced with careful consideration of limited capacity.

Impact

1	2	3	4	5
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Effectiveness

1	2	3	4	5
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3

Initiative Change Management

We act as change agents for critical sales initiatives by designing and implementing processes and tools that reconcile differing stakeholder needs and drive positive behavioral change. We actively monitor compliance and address emerging challenges to implementation.

Impact

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Effectiveness

1	2	3	4	5
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4

Sales Operations Team Design

We effectively define and fund the appropriate job roles and organization structure to efficiently deliver on the Sales Operations mandate. We clearly define the background and abilities required for success in each job.

Impact

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Effectiveness

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5

Sales Operations Talent Management

We ensure the sales operations team contains the right mix of high performers from Sales and other functions. Sales Operations should be regarded as an attractive and challenging career path that builds a mixture of revenue, analytical, and general management skills.

Impact

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Effectiveness

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6

Sales Process Development

Our sales process is widely understood by reps, aligned to our customer's buying process, and models the behavior and activities of high-performing reps (top 20%). We apply an objective assessment to test its validity.

Impact

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Effectiveness

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7

Sales Process Adoption and Compliance

Our reps want to use the process because they believe it will help their performance. We have a systematic means for monitoring sales process adherence and identifying root-causes of adoption challenges.

Impact

1	2	3	4	5
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Effectiveness

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Sales Operations Mandate and Design

Attribute Grading		
Potential Impact	Current Effectiveness	
If performed to the highest standard, the impact of this attribute on our firm would be:	5 = Superior	We do this regularly, systematically, and with continuous improvement
5 = Very High	4 = Strong	We do this regularly and systematically
4 = High	3 = Adequate	We do this regularly but in an ad hoc manner, or irregularly yet systematically
3 = Moderate	2 = Marginal	We do this irregularly and in an ad hoc manner
2 = Low	1 = Weak	We do not do this at all
1 = No impact		

Potential Impact	5 = Very High					
	4 = High		URGENT CHALLENGES			
	3 = Moderate					
	2 = Low					
	1 = No impact					
		1 = Weak	2 = Marginal	3 = Adequate	4 = Strong	5 = Superior
Current Effectiveness						

Sales Force Enablement

8

CRM Development and Processes

We ensure all CRM processes provide a positive ROI to sales reps which enables us to consistently gather high-quality data and provide clear visibility into the sales pipeline at all stages. A system is in place to proactively monitor CRM data quality.

Impact

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Effectiveness

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9

Sales Tool Development

We design, pilot, and deliver a limited number of tools that expedite the execution of key sales activities. Our sales tools are regarded highly by the sales force and are actively used, resulting in improved rep productivity.

Impact

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Effectiveness

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10

Sales Training

We develop and deliver curricula to address key knowledge and skill gaps. Training is targeted to individual needs and is embedded in daily workflow. Effectiveness is measured at a complexity level appropriate to the perceived return-on-measurement cost.

Impact

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Effectiveness

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19

Planning Process Stewardship

We conduct and use the results of a quantitative performance analysis to inform resource allocation decisions as part of the sales planning process. We systematically examine the root causes of underperformance and develop targeted improvement initiatives.

Impact

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Effectiveness

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18

Vendor Selection and Management

We have worked with procurement to develop a systematic process for making build vs. buy decisions. We conduct thorough due diligence, select/deselect, and manage vendors based on a clear understanding of total value delivered against our strategic objectives.

Impact

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Effectiveness

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17

Proposal/Contract Development

We support the proposal/contract generation process enabling the sales force to maximize their focus on high value activities, while ensuring deals are priced/structured in a way that optimizes win potential and maximizes financial performance.

Impact

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Effectiveness

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Sales Administration

16

Sales Forecasting

We deliver reliable long-term and short-term (e.g. weekly) forecasts that are trusted by the sales and finance organizations for planning purposes.

Impact

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Effectiveness

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15

Metrics Actionability

We have a principled process for selecting and defining metrics linked to our sales strategy and setting corresponding performance targets. We consistently derive and communicate actionable insight from our metrics in a way that compels key stakeholders to act on this data.

Impact

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Effectiveness

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14

Goal Setting

We use a consistent methodology to establish sales goals based on quantitative analysis of territory potential, past performance, and sales team capabilities, as well as management judgment. We set challenging, yet fair and achievable goals.

Impact

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Effectiveness

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13

Territory Analysis and Definition

We analyze sales potential and rep capacity to establish territories that provide the right level of sales coverage and ensure all reps have sufficient opportunity. We revisit territory definitions annually and balance customer relations with resource efficiency.

Impact

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Effectiveness

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12

Compensation Plan Design

We design our sales compensation plans to attract the right caliber of sales talent. The plans focus sellers on the key objectives associated with their specific job content and provide compelling rewards for overachievement.

Impact

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Effectiveness

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11

Sales Force Communications Management

We proactively manage and filter communications to the sales force to ensure that key messages are received and understood. We limit push communications (e.g. e-mail) and drive traffic to pull communications (e.g. portals) channels.

Impact

1	2	3	4	5
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Effectiveness

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Business Analytics and Reporting

Attainment Planning