



# Transforming your Inside Sales Team Scorecards

**"we MANAGE things  
we LEAD people"**

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**Date:**

**Part I – Basic Building Blocks** - we'll talk about: Your Team's Goals, Mission & Vision, Effective Onboarding and Training, Sales Manager 101, Coaching and Motivating your Reps, Reporting and Dashboard Do's and Don'ts's

	<b>Today 1-10</b>	<b>Goal 1-10</b>
<p><b>Your Team's Goals</b>  <i>How well are they known and understood? Are the goals aligned with the company's goals?</i></p>		
<p><b>Your Team's Purpose</b>  <i>Does everybody know the purpose? Does everybody know which hill they're taking on any day? Is it aligned with the company's Mission &amp; Vision?</i></p>		
<p><b>Effective Onboarding</b>  <i>Are your people able to sell more quickly? Are they made to feel welcome? Are the basics covered? Does your onboarding include some Sales Best Practices? Does your onboarding include training on your systems and tech?</i></p>		
<p><b>Effective Sales Training</b>  <i>This is NOT product training. This is ultimately the "how" of how your product/service is sold. Are your reps trained on Sales 101 blocking and tackling, overcoming objections, pre-call planning, value proposition statements. If so, how well?</i></p>		
<p><b>Sales Manager 101</b>  <i>Contrary to popular myth, your best sales rep does not always make your best leader. What does your ideal leader profile look like? Yes, we want them to be able to sell, but we also want them to be able to lead. Is this person able to lead by example, inspire, remove barriers, hold effective 1:1's, communicate up the chain effectively, and keep the team focused? (Among probably a dozen other tasks.)</i></p>		
<p><b>Coaching &amp; Motivating your Reps</b>  <i>Some say, "I shouldn't have to motivate my reps", and there's a part of that statement that is true. However, coaching works and the byproduct of a good coach and/or coaching sessions is the reps feel more motivated afterwards. What do your 1:1's look like? Are they inspiring or beat down's? (See employee engagement stats.)</i></p>		
<p><b>Reporting Do's and Don'ts's</b>  <i>For the love of God, please stop measuring every little thing. Just because we can, doesn't mean we should. Are your KPI's clearly defined? These should be the vital stats of your organization. Yes, if those vital stats go red, dig deeper. However, until then, information overload slows down the team, produces a nit-picking feeling, and may overall demotivate. Is success clearly defined for your team? Do they know what it is? Can they see it? Touch it? Articulate it?</i></p>		

## Part II – Leadership Traits

The Trait	Today 1-10	Goal 1-10
<p><b>What it's All About</b>  <i>It's not about you. Why did you become a leader? How would you describe your leadership style? Who's on your advisory team? How do you hold yourself accountable?</i></p>		
<p><b>Perspective</b>  <i>Does your team have a (1) Goal, (2) Purpose, (3) Perspective, (4) Clarity, and a clear path to (5) Execute? If not, what's your plan to put these pillars in place? If yes, which one area or areas need to be shored up to make your team more effective. The outcome of having these five areas defined and enforced is to allow your team to MOVE with less friction.</i></p>		
<p><b>A Functioning System</b>  <i>See the worksheet above regarding your overall system and processes in place. How well does your system work? What areas would you need to focus on to make your system more effective? The purpose of a functioning system is to provide the opportunity for all on the team to be successful. The system is essentially the lines on the road for your team to follow.</i></p>		
<p><b>Self-Awareness</b>  <i>Are you a Thinker, Feeler, or Doer? What are the three words you'd use to describe yourself? Your leadership style? Are you walking the walk and talking the talk? Do you have a coach?</i></p>		
<p><b>Ability to Harness and Use Resources</b>  <i>Who's at your table? Do you take the time to figure out what motivates your people? What matter to them? How about the rest of the organization? Being able to know and understand what makes people, departments, etc. tick drives alignment and allows for stuff to get done and removes obstacles (both perceived and real).</i></p>		

# My Annual Plan \_\_\_\_\_ year

## Step 3

Rules of engagement: No more than 3 milestones per quarter. Actions must be associated.

**QUARTER 1**

Milestone

Action



**QUARTER 2**

Milestone

Action



**QUARTER 3**

Milestone

Action



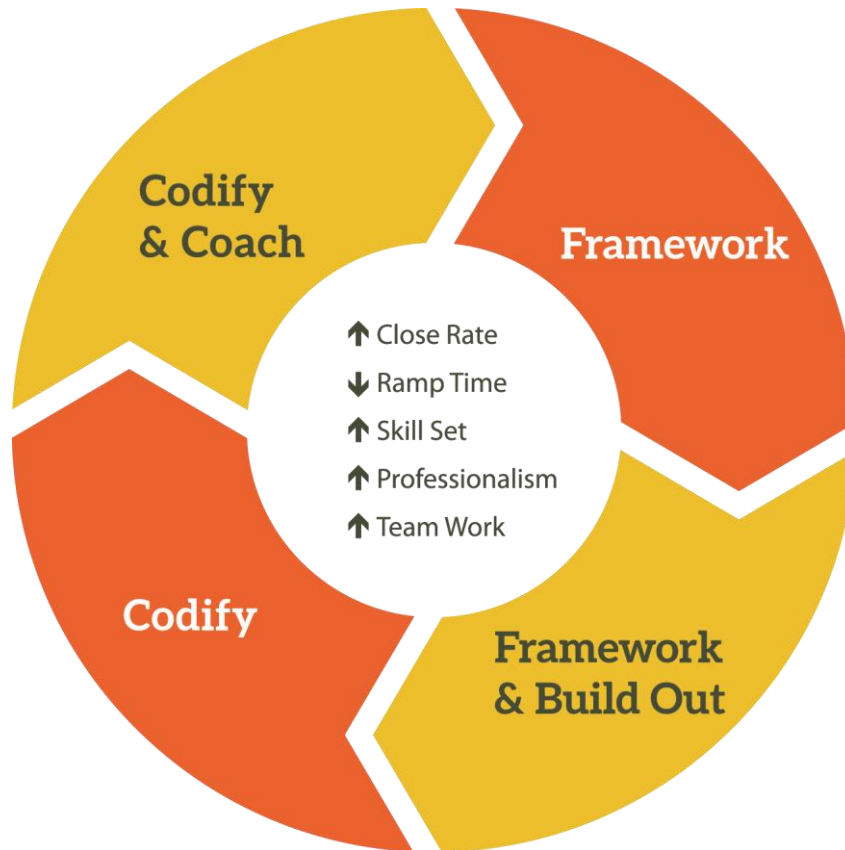
**QUARTER 4**

Milestone

Action



## Appendix A



1. Where should you spend your time?
2. Which area would give you the most return?
3. If you had to prioritize if you have more than one area to focus on, where would you start? What would be second? Third? Etc.