

Sales Operating System

Guide

- Sales Operating System defined
- Components of a Sales Operating System
- How a Sales Operating System Works
- Implementing a Sales Operating System

Liz Heiman
www.regardingsales.com

FACEBOOK

LINKEDIN

o. (775) 303 9617
liz@regardingsales.com
Reno, Nevada



B2B Sales Operating System for *Scaling* Sales

This guide will explain what a sales operating system is and why you need to implement one.

Processes and systems are critical to company function. Companies have processes around everything from production to accounting. Yet, sales organizations often operate with either no system or an outdated system that can't support company goals. Sales success requires the same kinds of systems and processes that all your other departments need. It's often referred to as sales operations.

Building and implementing a sales operating system
Gives you visibility into the inner workings of your
sales organization so you can have **reliable,**
predictable growth year-over-year.



Meet Liz !

Strategic Thinking - Breakthrough Results

Liz Heiman is the structural thinker behind Re: Sales™; a company focused on building B2B sales organizations that deliver extraordinary growth. Liz and her team meticulously create a roadmap of the step-by-step process for achievable results.

Solid Sales Methodology Rooted in Science

With a master's degree from the University of California, Santa Barbara, and a bachelors degree from the University of California, Davis, Liz is an experienced international political economist, well-schooled in digging through the data to interpret results. Her unique background delivers clients concrete solutions for complex sales problems.



Liz Heiman
CEO & Chief Sales Strategist

[Meet Liz](#)



- Predictable Revenue
- Manageable Sales
- Sustainable Growth

Are you feeling pressure to
increase sales?

Are you *hiring*
salespeople?

It's time for a sales
operating system.

Your Sales Organization should NOT be a Black Hole

CEOs and founders often talk about sales as if it is a black hole. They feel like they drop leads in the top and hope something comes out the bottom.

It shouldn't be that way!

While there will always be some unpredictability in sales, the better your sales operating system is functioning, the more predictable and reliable your sales growth will be.

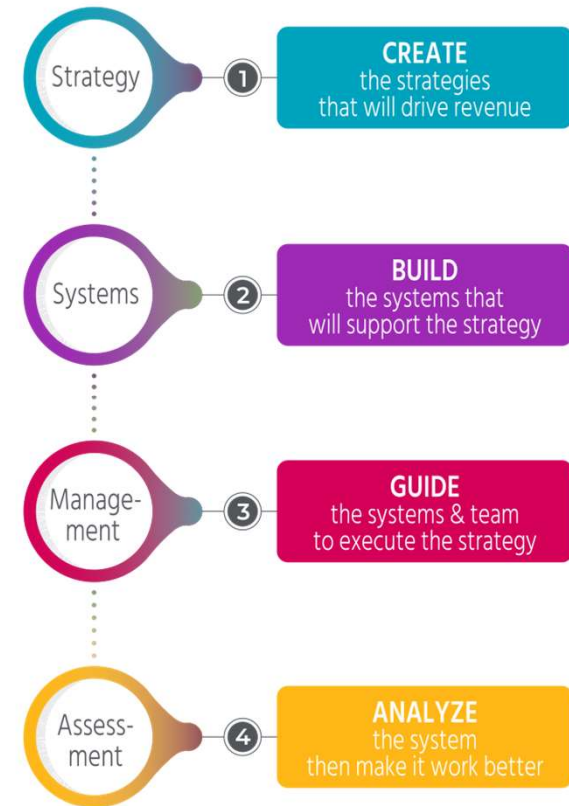


Sales Operating System

A *Sales Operating System (SOS)* is the infrastructure needed to run a sales organization that is manageable and predictable. Your SOS includes the strategies, the frameworks, and the systems that support you're your sales organization to deliver the sales you need.

Often, when people think of sales operations, they think of tech tools and training. Those are the things to use to support the sales operating system, not the system itself.

The sales operating system is the strategies, processes and systems that keep your team running. The mission is to implement the system and frameworks that will support the strategy you have created to achieve your goals for the company.



Processes and Systems

A Process is a series of rules and steps that take you from start to finish. Companies can have a lead generation process, a sales process, a process for responding to RFPs, a process for putting together proposals and a process for onboarding new clients. That set of rules and steps helps us ensure we don't miss anything important.

A system is a group of components that work together. The [Re: Sales™](#) Operating System includes strategies, frameworks and processes as well as technology to support it.



Strategy & Framework

Strategy is the plan to get from where you are now to where you want to be. You need a strategy for the business to achieve company goals and individual goals as well as for selling into and growing enterprise accounts. Sales is not a series of fortunate accidents; it is the result of well planned and executed strategies.

A framework is a set of descriptions and rules that help us understand how things work. I think every company should have a sales positioning framework that lays out how your company and product fit into the marketplace and a sales communication framework to set up guidelines around communicating with prospects and customers. Creating value proposition frameworks helps sellers and marketers understand how to frame messaging that helps prospects see your value.



Components of a Sales Operating System

An effective Sales Operating System has 4 components. The first component is the strategy. It starts with a vision for the company and a strategic plan. From there you can build other strategies and strategic frameworks to achieve the vision.

The second component is systems. Your organizations will be able to achieve the strategic goals when they have functioning systems and processes that will support the behaviors required to achieve the goals.

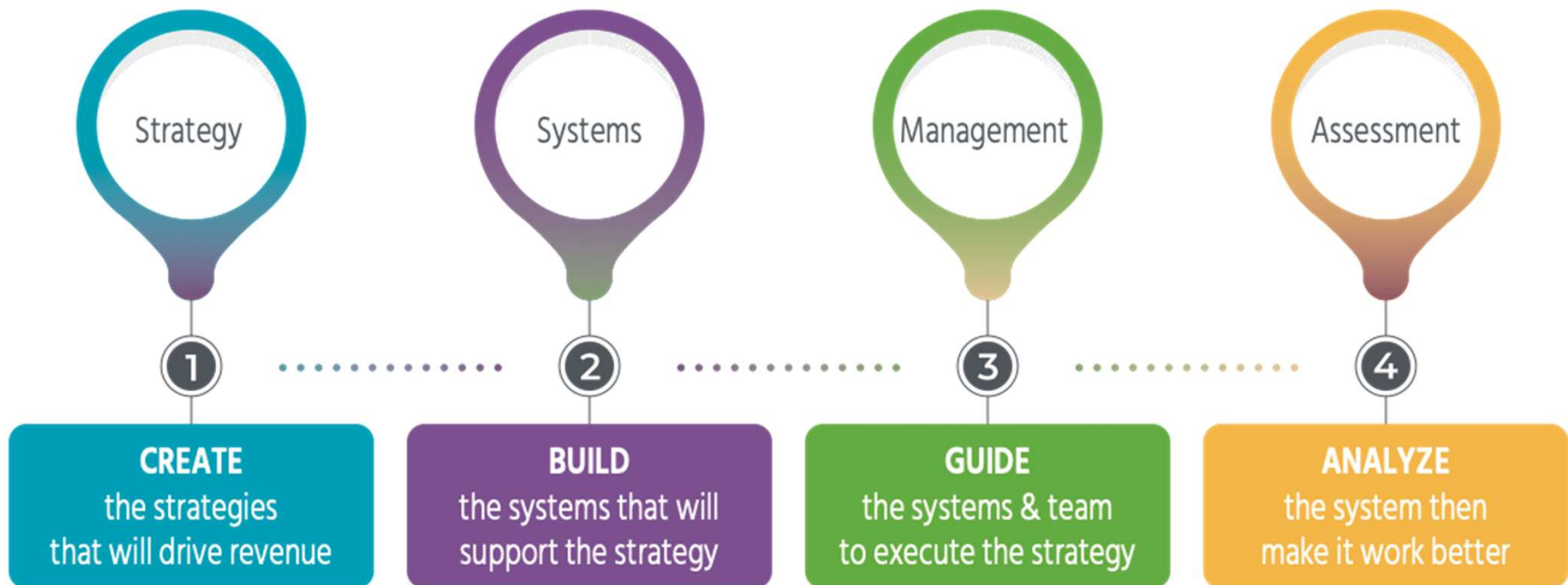
No system works well unless is managed and reinforced. The world moves naturally from order to disorder, and your sales team is no different. They will always do what is quickest and easiest. Not always what will get the results you want.

Finally, every system needs to be assessed. Do you have all the right components? Are they all working the way they should? What needs to change to get better results?

The next few pages will give you some ideas about what kinds of things to think about in each component.



Sales Operating System



Strategy and Framework



Your strategies and frameworks should include the following:

- Strategic Plan
- Sales Positioning Framework
- Sales Communication Framework
- Sales Strategy
- Lead Generation Strategy
- Account Strategy

It probably doesn't seem like a strategic plan has much to do with sales, but if the sales team is going to be effective, they need to buy into the vision, the values and mission as much as they need to buy into the goals. When they don't understand, it is hard for them to sound like true believers.

Your Positioning Frameworks helps your team understand where you fit into the marketplace, who your ideal customer is and the value propositions that will engage buyers.

A Sales Communication Platform helps everyone in the organization understand the who, what and how of communications to the buyers.

Your sales strategy is the plan to achieve the goals laid out in the strategic plan. The Lead Generation Strategy supports the Sales Strategy. Account Strategies help you penetrate and grow large accounts.

System and Process



Your systems and processes should include the following:

- Lead generation process
- Sales process
- Opportunity management process
- Lead follow-up process
- Demo process
- Hand-off processes
- Hiring and compensation process
- Onboarding process

The more complex your selling environment, the more important the systems and processes that support it are. It is common to have a lead generation process (often in marketing) and to have a sales process that lays out the steps of the sale. After that, things tend to happen more haphazardly than systematically.

The more systematic the activities in the sales arena are, the fewer the mistakes, and the more consistent the results. Make sure that the lead generation process is delivering qualified leads that are worth the seller's time. One of the biggest areas of confusion is the handoff from marketing to sales. Many leads get lost in the handoff.

It is critical that sellers follow the sales process, making sure to communicate with all the buyers and avoid skipping steps when possible. Once that sales process is established, there needs to be an opportunity management process to follow the leads from start to close. When the sales process breaks down, so do sales results.

Hiring and onboarding should never be left to chance. Hiring the wrong people or not onboarding the hires properly is one of the biggest problems in smaller sales organizations.

Management



Your sales management process should include the following:

- Sales meeting process
- One-on-one process
- Coaching process
- Evaluation process
- Funnel review process

Salespeople are notorious for being independent, self-motivated and extroverted. They tend to disdain process and systems. Despite that, they are more effective when they follow systems and processes that support their success.

For those reasons, it is difficult to manage salespeople. What you can do is manage the processes and hold your salespeople accountable for fulfilling certain expectations. The clearer the expectations and the more consistently they are reinforced, the more likely your salespeople will be to follow them. As soon as you stop managing and reinforcing the processes, they will stop following them.

Establish structure around team meetings, one-to-ones, coaching sessions and funnel review. Set the expectations about what will happen before, during and after. Don't veer from the expectations. Once they know what to expect, they will know how to prepare and will be prepared. If they aren't prepared, don't let them off the hook.

Consistency around the right behaviors will improve results every time.

Assessment



Your assessment process should include at the following:

- Funnel assessment
- Win-loss assessment
- Profitability assessment
- System assessment
- Team assessment
- Leadership assessment

If you have the right strategies and frameworks in place and the systems to design support the strategies you have implemented, you should start to see the results you need. There should be fewer fires to put out. Close dates should be more accurate. Close ratios should improve. Sales cycles should get shorter. Overall, sales should become more predictable and most importantly, sales revenue should increase.

If that isn't happening, then it's time to assess what you have in place. Are you positioned properly in the market, and is your messaging working, or do you need to make some changes? Are your lead generation and sales strategy workable, or should they be adjusted? Are the systems you set up efficient and easy to use? Do they support the sales effort, or should they be refined? And finally, do you have the right people in the right jobs to make this all work?

Like any system, your SOS needs to be improved constantly and changed as your situation changes.

Implementing your system



Your SOS is unique to your company. It isn't plug-and-play, and there are no shortcuts.

Your Sales Operating System must match the specific realities of your company. Once you create it, it is critical that everyone who touches the system understands it. The sales operating system isn't just for sales. Marketing, operations, accounting and anyone else who interacts with the process must understand and support it.

Once everyone understands it, set out the expectations about how everyone will interact with the system. Make sure they understand the rules, the cadences and the outcomes expected. No one is exempt.

Don't accept excuses. Once you set out the expectations, everyone must use the SOS. That means everyone is working toward the same strategies and goals. Everyone understands what their role is in achieving those goals. Everyone is following the process and using the systems.

Reinforcement is a MUST. If leadership indicates at any time that it is OK to skip steps or ignore the rules, people will. As a result, the system will fall apart, and the growth will stall, or sales will decline.

Cultural Change

The sales operating system represents a cultural change in your organization, and that kind of change is never easy. So, the question for you is, can you do it and is it worth it?

If you want

- A predictable revenue stream
- To manage the unmanageable
- Fewer mistakes
- More sales revenue

Then, it is worth the effort it will take to create, implement and reinforce your sales operating system.

Good Luck! If you would like some help getting started schedule a no cost, no obligation call with a sales strategist.

[Schedule with a Strategist](#)





Connect with me!

Liz Heiman

CEO & Chief Sales Strategist

O: (775) 303-9617

Liz@regardingsales.com

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Schedule now!

And get a **FREE** sales strategy session.
Start increasing your revenue!



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