The National Salesperson PROGRAM RESOURCE

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Franchise Services inc.

National Salesperson Program Resource

HIRING, TRAINING AND MANAGING SALESPEOPLE GUIDE

VERSION 9

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All franchise locations are independently owned and operated. This guide was written to share industry best practices, network successes and assist you in the process of hiring, training and managing a salesperson. Employees of Franchise Services, Inc. are available to provide advice and support, but individual franchisees are solely responsible for all hiring, training and managing decisions.

1. Program Overview

Industry and network studies have shown that in order to continue to grow and succeed in today's competitive market, a center needs to have a professional salesperson. In recent years there has been a decline of walk-in traffic and a move from traditional retail locations to industrial locations. The good news is that industrial space is generally less expensive, and you get more of it. The bad news is that owners have to rev up their marketing and sales activity to drive sales.

Outside sales is now an essential strategy, not just a tactic. Creating a culture in your center that drives and supports sales. Every member of your center is part of your sales team, and the point of the spear is the outside sales team. It is imperative for future growth that someone takes your front counter to your customer's office.

Research has shown that print providers that have an outside sales team consistently outperform centers that don't. In our network, the average sales of a center with a full-time outside salesperson are nearly three times that of a center without an outside sales presence.

In this guide, we will identify the best practices of leaders in our network to indicate the type of salesperson you need for your business, including what qualities to look for in that person, how to find them, how to recruit them and how to compensate them. Following these recommendations will give you the best chance to succeed with an outside salesperson.

Among your considerations as you prepare to hire are:

- Average sales new reps completing one year are $215,000
- Utilize the cash-flow tool to project costs and ROI
- Review the sales resource guide to ensure you are aware of available support and tools
- Create a center-specific sales plan for your new salesperson

Using the experiences of successful franchisees and the latest industry intelligence, this guide will take you step-by-step from profiling the type of sales rep you want to represent your center to the hiring decision and beyond. Once you have hired, utilize the national salesperson program to train, coach and inspire your salesperson to reach their potential. Involve your BDC and BMC from the beginning and position them as valuable resources to assist your new salesperson. An early introduction to the resources available from FSI will build confidence and assist your salesperson with a faster onboarding.

When you read this guide, highlight the parts that are most helpful to you and use it as a reference for recruiting and interviewing. Your business development consultants and business management consultants are available to answer any questions you may have about an outside sales program.

2. Managing a Salesperson

You have made a significant investment by hiring a salesperson. Now it is recommended that you protect your investment by actively managing the salesperson. If you do not spend the time to manage your salesperson, the chances are they will fail. Sales management is an ongoing, forever process, not a one-time event.

Sales management is the art of achieving your company's outside sales objectives through other people. As a sales manager, your job is to assist your salespeople to develop their selling skills, and to coach and counsel them regularly to ensure that they are meeting objectives. You must be committed 100% to the sales process and to the salesperson you have hired.

The job of the salesperson is to find/create new opportunities, advance those opportunities and close those opportunities. The job of the sales manager is to help salespeople to find/create new opportunities, advance those opportunities and close those opportunities.

Effective sales managers have the following characteristics: motivators, organizers, diplomats, leaders, people-oriented, goal-oriented trainers and developers. To be effective in this role, you must know what you want the sales team to accomplish and be able to manage the activities that will lead to its achievement.

Foundation of Sales Management

1. Setting Expectations
2. Sales Planning
3. Training
4. Helping Them Succeed

Setting Expectations

Selling is hard! As a manager, you must establish with the sales rep a clear understanding of what their role is and how they will be measured and managed. If you want them to achieve a certain standard, they must understand what it is and how they are expected to get there.

You should set expectations for:

- Role of the Salesperson
- Activity
- Hours and commitment
- Reporting
- What it takes to be a top performer

Role of the Salesperson

The salesperson has been hired to drive profitable revenue to the center by:

- Finding and creating new opportunities
- Advancing those opportunities
- Closing those opportunities
- Creating new customers
- Selling more to existing customers
- Reactivating dormant accounts
- Promoting/cross-selling/upselling new and additional products and services

As the manager, you should always be asking if the activity they are doing now is accomplishing one of these goals. All activity should drive one of the ways of growing profitable sales shown above.

Activity

As a sales manager, you will need to establish the activity levels that can be measured, managed and coached. In sales, numbers matter. A salesperson must understand that they will not be successful unless he/she is spending the majority of their day contacting prospects and customers. There is no time to waste! The key to reaching the appropriate activity levels is sales planning, which we will review in the next section.

In order to properly track activities, you should establish which CRM system will be used to manage their activities. Time will need to be spent each day updating and scheduling using the CRM system.

Hours and Commitment

Successful salespeople are committed to getting the job done. They have both a want and need to be successful. They need to understand that your expectation is that they will do what it takes to get the job done. This is not a part-time job, and often the most successful salespeople work more than an eight-hour day. Salespeople need to understand they are not on the clock, and getting the job done is what is needed.

Reporting

A sales manager needs to establish from day one what is expected for reporting. On day one, you should require them to turn in a report, even if it is all zeros. This lays the groundwork that the report is not optional. As a manager, if you require a report, you must read it and utilize it for coaching and managing. If you collect reports and never use them, the salesperson will not respect the process and will not report relevant numbers. In the section "Helping them Succeed," we will cover using reports to manage and coach.

Reports you should require from salespeople:

- Number of pre-set appointments for previous week
- Number of pre-set appointments for upcoming week
- Daily/weekly plan to set appointments
- Actual activity numbers (daily/weekly/monthly)
- Best prospects
- Quote follow-up

Daily/Weekly Plan

You should require a salesperson to turn in a plan for how they will spend their day. It can be done each day or by week. This plan should list activity goals, sales goals, appointments set, best prospects to target and pending quotes. It should also have a general hourly plan of how they will spend their day. As a best practice, they should submit this first thing on Monday morning, and it should be reviewed at minimum during a weekly meeting with them.

Actual Activity Report

This report is a summary of what they accomplished during the time period you are measuring. Actual numbers matter, and you need to ensure whether they are meeting the goals they set in their daily/weekly plan.

Quote Follow-up

Every quote has a result. As they say in baseball, you win some, you lose some and some get rained out (postponed or cancelled). You need to understand what happened with every quote and why, if possible. A basic requirement should be to report the status of each quote weekly.

Reporting to Them

You as a sales manager, have a commitment to the salesperson to report to them as well. The key reports they need are:

- Sales numbers: promptly give them their numbers and keep them informed of what they are, minimum weekly.
- Production timelines: keep them informed of any production scheduling that could affect their ability to meet a customer's needs so they can properly set expectations for their customers.
- Quote turnaround: it is often a fact that the first company to return a quote will win the quote; this is even more so with a salesperson. If you cannot turn a quote quickly to a salesperson, you need to set the expectation of when they can expect the quote.

Top Performer

Most NEW salespeople will set the goal of being a top performer; however, many do not have any idea what it takes to be one. It is a good practice to discuss what it takes with them upfront to understand what they need to do to reach that level. Share with them the following:

- Do more than just the minimum; exceed expectations for both activities and sales.
- Often exceed the 40-hour workweek; put in the time to meet goals.
- See themselves as problem solvers and are always trying to help their customers with creative solutions.
- Have the discipline to create and execute a sales plan.
- Never stop learning and improving themselves; create value for customers by being a resource.
- Commit to being a sales professional and don't see the position as something to do till they find something else.
- Are driven to win, they hate losing quotes, customers or business.
- They want to see their names at the top of the rankings and strive to beat those who are ahead of them.

Salespeople who want to reach the highest levels need to know what it takes. Setting clear expectations of what you want them to do and how you want them to do it gives them the confidence to get the job done. As a sales manager, you want to ensure there are no misunderstandings of what they are expected to do. If you do not set expectations, they will not be able to meet them.

Sales Planning

The basis of any successful business is a good business plan. The same is true for successful salespeople. Having a sales plan is the roadmap to success and will take the guesswork out of the sales process. By including measurable goals and activities, you can create a plan that can be adjusted and corrected to improve performance.

Goal Setting

There are two areas of goal setting that need to be addressed: financial and activity.

The financial goals should be set month-by-month and be adjusted annually. We have established goals based on network averages; first-year sales include house accounts that were given to salespeople in order to grow and maximize the account sales. If you start a new salesperson with no current business, they will be challenged to achieve these numbers. It is a best practice to start a salesperson with 15-25 accounts that are capable of growing.

See Section 7: Resources for the current average first-year sales for a salesperson.

An annual sales planning kit is released in the fall that you and your salesperson can utilize to set the financial goals for the following year. This planning kit can be found on the BMSS, and your business development consultant is available to work with you and your salesperson to complete the plan.

On day one, the sales rep should know what his/her goals are. They should have a monthly goal each month, and both of you should review it each week to measure progress towards that goal. By regularly reviewing the goal, you keep it clearly in focus. This also allows you to assist if they are running behind or recognize and applaud when they achieve their goals. Setting up activity goals can be a bit trickier. We have provided you with an initial sales plan to get a salesperson up and running that includes activity levels for you to measure and monitor. To set activity levels for experienced salespeople, you need to work backward.

Questions to ask:

- What do they need to do to reach their goals?
- How many customers do they need to get?
- How many appointments do they need to have to get a customer?
- How many tactical touches do they need to get an appointment?

For example:

Goal:	$100,000 in new sales
Customers:	20 new customers average $5000 each
Appointments:	5 appointments to get 1 customer
	100 appointments to get 20 customers
Touches:	50 touches to get 1 appointment
	5000 touches to get 100 appointments
Time:	250 touches a week
	5 appointments per week
	1 new customer per week

This formula will vary by salesperson, but there is science behind it if you measure the activities and set goals to achieve.

Appointment Setting Process

B2B sales studies show the ***number one determining factor of a salesperson's success will be their ability to have pre-set appointments with prospects and customers.*** By having a preplanned system to follow, you can manage your salesperson's prospecting activity. Getting an appointment can be the hardest thing a salesperson does. Each prospect should be put into a system of predefined activities that can be tracked. Since it takes 8-12 touches to get an appointment, this system needs to be defined and worked. As a manager, using this type of system allows you to ask where they are in the process and what their next steps are. Ninety percent of salespeople quit contacting a prospect after three touches. Make sure yours continues to follow up, so they do set appointments.

People respond differently to different types of touches, so a variety of ways should be used to contact prospects. There is no perfect system, so don't get caught up in seeking one. Here is a sample system that you can use:

1. Cold call/research
2. Suspect becomes prospect
3. Letter
4. Phone call
5. Email
6. Share a case study
7. Personal visit
8. Phone call
9. Website share
10. Card
11. Email
12. Phone call
13. Personal visit
14. Evaluate

Declining Activity

Not every salesperson will have to do the same amount of activity, and that is okay. The number should be higher for new salespeople and lower for the more experienced, successful salesperson. The more accounts and sales a person has, the more time they will spend servicing those accounts. Less time will be spent prospecting. A new salesperson, however, has little to do but prospect, so you should expect much higher activity numbers.

Time Management

A salesperson's most valuable resource is time. How they manage their day will lead to their success. As sales manager, it is important you understand how they manage their time and ensure they have the time they need to be successful. Salespeople who are pulled into the center to answer phones, deliver jobs, work in bindery or complete other operational tasks will sacrifice selling time. A sales manager must work to limit these interruptions or lower the sales expectations of the salesperson.

Annual Sales Planning Kit

Every year FSI creates a sales planning kit that is released in the fall. This sales planning kit helps you and your salesperson to create a plan for the following year.

- Download the sales planning kit
- Print copies for manager and salesperson
- Review and discuss planning steps
- Involve BDC/BMC for support
- Provide data to salesperson to complete plan
- Set financial growth goals for the following year
- Create due dates for the plan
- Set time and date to review the plan

Training

Ensuring a salesperson is properly trained to perform their duties is imperative. It is recommended that a salesperson receives initial and ongoing training in the following areas:

Center and Staff

- A thorough understanding of how jobs are received at the center and processed
- How jobs flow through the center
- Who is responsible for each step of the process
- How they are expected to interact with staff
- How to get quotes and process work orders

FSI Support

Make sure they are aware of the breadth of support FSI can supply and they understand they have resources to help make them be successful. Utilize the BMSS to access support, marketing and training materials.

Sales Process

An understanding that every account or potential account is in 1 of 4 stages:

Suspect: Any business who might be able to do business with your center
Prospect: Any suspect that has been qualified to meet ideal customer criteria
Customer: Any prospect that has spent money with your center
Maximized Customer: Any customer that utilizes your center for all of the services you provide.

It is recommended that the sales manager communicate to the salesperson that their primary role is to move a suspect to maximized customer.

Products and Services

Your sales reps will require training on any products or services you expect them to sell. They need to understand how things are produced and priced, plus the value they provide. By having a firm understanding of products and services, they will be able to sell more. You can train them early or train them later. Early is better.

Vendors

Vendors to whom you outsource can be valuable training partners. Since they would like for your center to order more, utilize your vendors to train your rep on how to sell their products or services.

Helping Them Succeed

Operations and Production

Your salesperson has the potential to be your biggest customer. As with customers, they need to be supported and serviced. Your team needs to support the salesperson, and you set the tone. Make sure new customers and quotes are well cared for and are celebrated. The salesperson cannot be seen as an outsider.

Marketing

Support your salesperson by marketing to their prospect and customer lists. Make sure to include their prospects on your Automated Marketing Program (AMP) list as well as the list for your center marketing, like direct mail, newsletter mail/email and center promotions. By integrating your marketing with their sales process, you can leverage both for more success.

Managing and Coaching

Managing your salesperson involves ensuring they are doing the right activities and doing enough of them to be successful. Coaching is helping them do those activities better, so they achieve better results from their efforts. Work with your BDC to ensure you are managing and coaching for maximum effect.

Regular Meetings

It is recommended you hold weekly formal sales meetings. These meetings should cover month to date performance, monthly sales projections, plan for reaching their projection. As well these meetings provide an opportunity to offer training and support that will allow them to reach their goals. Time and place for these meetings should be established in advance, and preplanning is crucial for success.

11 Activities for Sales Managers

Below is a list of 11 activities for sales managers. Your business development consultant is available to discuss, train and work with you to execute these activities.

1. **Identify ideal customer criteria:** It is your role to identify, explain and ensure that your sales team understands what a "good" customer looks like so that they spend their time focused on the right opportunities.
2. **Hold consistent and effective sales meetings:** Good sales meetings are held on a regular basis with a consistent agenda that includes topics that hold the salesperson accountable to their commitments, help them prioritize their efforts and train them to be better at their job. It is also the opportunity for the sales manager to help and clear obstacles out of their way.
3. **Ride with your salesperson:** Going out in the field with your salesperson to go on appointments, driving the territory to review new opportunities and discuss current opportunities gives you the chance to see your salesperson in action. This will give you a better opportunity to help them and assess their training needs.

4. **Provide your salesperson with ongoing leads:** While a salesperson is responsible for generating their own leads, in order to follow-up and maximize your marketing efforts, it is wise to give salespeople leads that come into your center. Work with your BDC and BMC to help establish criteria for giving out leads and set expectations on follow-up for those leads. There are several new lead development vendors now available that you might want to consider utilizing to support your salesperson. Please see Section 7 Resources for a complete listing.
5. **Provide ongoing sales training:** Top-performing salespeople never stop learning and it is in your best interest to ensure your salesperson is always improving. Make sure they attend all appropriate FSI training events, utilize vendors and provide books, blogs and resources for continued learning.
6. **Give them sales and marketing materials:** Whether it is business cards, brochures, sell sheets, samples or content marketing, make sure your salesperson is never empty-handed. Arming your salesperson with printed content gives them a reason to visit and talk to customers and prospects, thus driving greater engagement.
7. **Be fast to respond to a salesperson's requests:** The ability to respond to a customer with an answer or a quote is imperative. Often the first salesperson to get back with a customer will win. Furthermore, many prospects have been cultivated over months of sales efforts. The prospect will expect a new salesperson to respond in a timely fashion. In order to take business from the competition, you need to prioritize these requests. Set clear expectations with salespeople on timelines for quotes so that they can set proper expectations with prospects and customers
8. **Provide solutions, not roadblocks:** the first job a prospect often asks for help with is a difficult one, to win more business, the salesperson must often find a solution. Small, difficult jobs often lead to turning into your best customers. When a salesperson brings you a less than ideal job, look for solutions, options and ways to help the customer and not dismiss the project on the spot. If a sales manager criticizes or says no to challenging projects, a salesperson often gets discouraged and will stop looking for new projects.
9. **Collaborate on client strategy:** Encourage your salesperson to bring you challenging prospects and projects. Utilize your experience and knowledge to help them strategize on next steps and solutions. It is important to be a resource to your salesperson to ensure opportunities move forward and are not missed altogether.
10. **Help them write a sales plan:** Nobody wants to write a sales plan, but having a plan is both a guide and commitment to hitting your growth goals. Understanding where your sales will come from and how you will get them is critical to both the salesperson's success and yours.
11. **Recognize and celebrate success:** Selling is hard and to keep your salesperson motivated, but it is necessary to recognize when things go well. Great salespeople usually need reinforcement and pats on the back. Recognizing small successes like setting an appointment with a prospect or bringing in a first-time job (regardless of the size) encourages them to set more appointments and bring in more first-time jobs.

Contact your BDC for ideas and support to implement the above sales management activities.

3. Preparing to Hire A Salesperson

Are you ready to hire? Do you have the infrastructure and the plan to maximize the investment you are making in hiring a salesperson? This section will review what steps you can take to make sure your new salesperson will be positioned to hit the ground running and reach profitability as fast as possible.

In this section, we will identify the areas of your business that should be addressed prior to hiring a salesperson, including:

- Sales Strategy
- Lead Generation
- Sales Process
- Sales Tools
- Sales Management Training

Sales Strategy

"Help our customers grow by helping them achieve their business objectives. At [insert your brand], we pride ourselves as a leader in the business services market by offering advanced technologies that help our customers reach their customers more effectively. From graphic design and printing to signs, mailing services, promotional products, packaging, labels, online ordering portals and direct marketing, we provide quality in everything we do so our customers get noticed."

In order for a salesperson to deliver on this strategy you must be able to show them how we do this. Within your center, the products and services you provide today help our customers, and the best way to show a new salesperson is by showing them what you do. Successful projects and programs always start with a customer's problem. Then we create a solution and that solution generates results for the customer. Identify what your center is doing for your customers, why these customers come to you for support and how you help them so they become loyal customers. The key to their success and yours is from day one to position your center as a provider of value and not a commodity printer.

Activities:

- Identify best customers and how you have helped them
- Pull samples of projects and programs that show this
- Be prepared to present to sales applicants and a new salesperson what a successful sale looks like
- Read the past several years of the Application Innovation Awards (AIAs) published by FSI and pull out those success stories you feel are a good fit for your center
- Be prepared to share these with sales applicants and a new salesperson
- Define who your best customers are and identify the prospects you would like your salesperson to call on
- Target prospects by size, industry, geography and buyer

By being clear on what you are selling, the value your center provides, the real- world applications and how they can help customers, you will be establishing what you want the salesperson to sell and go to market with. By clearly understanding this yourself, you can position the salesperson for faster breakeven and profitability.

Providing Integrated Marketing Services

Review the circle of products and services and rate your center and yourself on your readiness to deliver on these products and services. If you cannot or do not offer services, you will need to expand your center's product line to support a top- performing salesperson. Think about how much you do today and which of these products you think will be a growth opportunity in your center. The goal of this exercise is to be able to clearly tell a new salesperson the products and services you want them to sell and why. You should be able to offer all the products and services, but some are more profitable and core to what you do, so be able to clearly explain that to a new salesperson.

Activities:

- Review the products and services below
- List what you provide today
- List what you can provide but don't do today
- List what you do plan to offer
- Identify those products that you want to focus on growing

Products and Services

- Collateral – print and copy
- Promotional products
- Data and mailing services
- Signage basic
- Signage advanced
- Direct marketing
- One-to-one marketing
- Online ordering portals
- Packaging
- Labels
- Video
- Creative services
- Website development
- Content development
- Social media support
- Anything else you want them to sell

Lead Generation

One of the most crucial things to a salesperson's success is quality leads. Getting a salesperson in front of as many people who buy what we sell as possible in the shortest amount of time is imperative. Having a plan of attack before they start and leads ready to go on day one can jump-start their success.

In this section, we will review where these leads can come from and how you can create better leads for your salespeople to call on. The key areas we will review are:

- Dormant Accounts
- Current Accounts
- House Leads
- Territory Targeting

• Automated Marketing Program
• Center Marketing

Dormant Accounts
Every center has a list of customers who have stopped doing business with them for one reason or another. This is a great source of leads for a new salesperson. We know they buy what we sell because they have bought from us before. We usually have the contact name, address, phone number and a purchasing history. Before you hire, you need to decide if you are going to provide the new salesperson with a list of dormant accounts. This should be a highly targeted list of accounts you would like back. It should not be a list of every account who has ever done business with you!

Activities:
- Decide how long someone has been dormant to be on the list and how far back you want to go
- Pull the list and review, remove any accounts you know are no longer in business, moved out of the area or you don't want back
- Create an excel spreadsheet listing
  - o Company name
  - o Last known contact name
  - o Phone number
  - o Address
  - o How much they used to spend annually
  - o Any details you think would be helpful
- Next you should rank these accounts by which you want back the most to which you want back the least
- Be prepared to provide your new salesperson with 25 dormant account prospects on the day they start (As they qualify/disqualify these accounts, you can give them more)
- Don't overwhelm them with hundreds of dormant accounts at one time. By giving them 25 at a time, you will be better able to manage their activity and progress

By creating this list before you hire you will be able to tell potential candidates that you have a list of dormant accounts you will be giving them and how many. This will help you attract a better salesperson as good salespeople know the value of such a list. This list will also shorten the time it will take for the salesperson to get appointments as it does some of the initial prospecting for them.

The list you create can also be used as a sales management tool. You can ask for and expect monthly reports on where they stand with each account on the list.

Current Accounts
Another place to find leads for a new salesperson is in your current account base. Within your current accounts, there are most likely customers who are only giving you a small percentage of their work. This is especially true of large accounts where your center may be doing work for just a few people or departments but they have many more you don't work with. By analyzing your current account base for underdeveloped accounts, you can provide a list of accounts with known growth opportunities.

Suggested Activities:
- Print a list of your top 100 accounts
- Cross off any maximized customers
- Highlight any customer you believe has substantial growth opportunity and create an excel spreadsheet
- The list should include
  - o Company name
  - o Current contact names
  - o Address and phone numbers
  - o Current average monthly spend
  - o What they currently buy
  - o Any details you think would be helpful

By creating this list before you hire you will be able to tell potential candidates that you will provide them with a list of active accounts and how many. Good salespeople know the value of such a list and that it will shorten the time it will take a salesperson to get appointments, which is where selling begins.

The list you create will also be utilized as a sales management tool. You can ask and expect monthly reports on where they stand with each account on the list. To insure there is growth on this list and you are not just paying commission on work you would have gotten already, you will need to have a management plan. During weekly meetings you should review progress they are making within these accounts.
- Number of appointments
- New contacts
- New products or solutions offered
- Next steps to move the account forward
- Average monthly sales growth

It should be understood that if the salesperson is not growing the account or moving the sale forward, the account will be returned to the house. This process should be formally reviewed quarterly.

House Leads
Potential sales leads come into the center every day and you should have a plan to follow-up on these leads. Your investment in center marketing activities drives leads, and you need to decide what role the salesperson will play in handling house leads.
- Paid search leads
- Automated Marketing Program (AMP) leads
- Local direct mail
- Social media leads
- Local advertising

The main way leads come in will be phone calls and emails that request a quote or information. After a job is complete for a first-time customer, there is opportunity to grow the account. With active sales follow-up marketing will be more effective.

You need to determine the scenarios in which a lead will go to the salesperson. Criteria you should consider:
- Size of the quote
- Potential value of the customer
- Request for information could be a large opportunity
- Could a small job lead to a big customer?

By reviewing these scenarios you can come up with a plan of what would be passed onto a salesperson.

Activities:
- Before hiring, monitor quotes, requests for information and first-time jobs
- Track the size and how many during the month would be best served by a salesperson
- How are leads currently handled in your center and how can a salesperson make this process more effective

By tracking this for several months you can figure out how many leads you will pass onto the salesperson. As you interview a potential salesperson, you can tell them on average how many leads come into the store and how you will be providing them with these leads. Again, high level sales candidates will understand the value of these leads.

Territory Targeting
Helping a salesperson get off to a fast start can be facilitated by doing some preliminary targeting for them. Within your territory there will be certain accounts and areas you will want them to go after. By identifying them up front you can take the guesswork out of where you want them to spend their time and focus them on the best opportunities to grow the business.

Activities:
- Drive your territory to identify areas you want them calling on
- Identify key accounts
- Identify business parks, office buildings and specific commercial zones
- Identify accounts and areas you don't want them to call on (house accounts, bad paying former customers, areas that are hard to service or support)
- Be prepared during the first week to drive the territory with them to show them where and what you expect
- Create a list of the top 25 accounts you don't do business with today but want to do business within the future

By giving a new salesperson specific direction on who and where to target their prospecting you can shorten their ramp up time. They will not have to research or flounder around on their own. You can manage this direction by asking for updates on specific accounts and prospecting areas.

AMP and Center Marketing
You can increase the ROI on your marketing budget by coordinating it with your sales effort. Before a salesperson starts, decide what center marketing activities can be leveraged with a sales effort.

The AMP emails and direct mailers, newsletters and local emails can all be part of your salesperson's efforts. Review each marketing activity and how a rep can contribute and follow-up.

Activities:

- Review your AMP list
  - o Who can become a prospect?
  - o Require your salesperson to add a minimum of five prospects to the AMP list each week
  - o Hold them accountable at the weekly meeting to provide those names
- Decide what other marketing tools should be utilized for their prospects
- Define the process and due dates for them to participate in the marketing
- Define the follow-up you will expect for each marketing activity

By creating a marketing plan to support your salesperson you will shorten their sales cycle and increase your marketing ROI. You will also have a plan in place to manage your salesperson.

Sample marketing plan to support a salesperson:

- Add a minimum of five prospects per week to AMP
- Send newsletter (email/direct mail) to all customers/prospects
- Send one direct mail piece per month to all customers/prospects
- Add your salesperson and contact information to your .com website
- Monthly review of ongoing local marketing
- Implement lead management and quote follow-up best practices

Sales Process

The key to the success of any salesperson is making sure they understand the sales process and your expectations of them to follow the process. Being able to talk to them about this before you hire, then coach and manage them after you hire is important to ramp up time and long-term success.

The steps in the process are:

- Prospecting: The activity of finding potential customers and qualifying them as worth their time to pursue
- Research: Using Google, websites, LinkedIn, social media, etc.
- Appointment Setting: Once a prospect is identified, an appointment must be set
- Appointments: Once an appointment is set, there must be an objective and plan for that appointment to assure its success
- Presenting Solutions: The result of successful appointments is being able to create solutions utilizing our products and services and presenting them to the prospect
- Closing: Asking for the next step, the order, the business
- Account Management: Once a prospect becomes a customer, effective account management must be utilized to make them a maximized customer and keep them as a long-term customer

As a salesperson grows their sales, the time spent on each activity will change. A new salesperson will spend the majority of their time prospecting and appointment setting. A successful salesperson will spend more time on account management. Establishing these activities up front and setting expectations will keep a new salesperson focused on doing the right things to achieve their goals.

Sales Tools

Important to the success of any employee is having the right tools for the job and sales is no exception. Provide the right tools to do the job the day the salesperson starts. By being ready, they will be able to begin executing the onboarding process and getting to profitability faster.

Work Area:

The salesperson should have a desk and area that will allow them to concentrate on their job. Whenever possible, they should not be in a production area that is loud or busy. It should not be at the front counter where walk-in customers will interrupt what they are doing. This work area should have a telephone and computer with Internet access. It should also be dedicated to the salesperson in order to make him more effective and efficient.

Computer:

A computer, ideally a laptop, should be provided. Current Microsoft Office software is critical as is an Internet connection. Outdated technology and poor performing equipment will slow down a salesperson's ramp up time and long-term success.

Email Address:

A professional email address should be provided. It should be in their name and not a generic email address. It should not be from Gmail, Yahoo, Hotmail or any other free email provider.

CRM System:

The computer you provide should also include a software or plan on how they will be tracking their prospecting and customer activity. We will review CRM systems later in this guide.

Cell Phone:

Provide a company cell phone to your salesperson. At no time should they utilize a personal cell phone for business. This insures that if something were to happen to them you would still get customer calls and be able to respond to them. Modern phones should be used. Old technology makes a salesperson look out of touch and unprofessional. Establish from day one the phone is for business use not personal use.

Printed Sales Collateral

As a printing company it is imperative that you have printed sales materials for your salesperson. These materials should be available and on the salesperson's desk when they arrive on day one. That sends the message that they are ready to go and gives them confidence they can get started. Below is a list of recommended items to have pre-printed:

- 1000 Business cards
- 250 Capability brochures
- 50 each
    - o Latest newsletter
    - o Current mailers and postcards - these will change as newer material becomes available. Check with your BDC or the marketing department for up-to-date materials.
- 250 signage brochures
- 100 online ordering portal brochures

- 250 branded note cards

Having these pre-printed and ready to go means your sales rep isn't waiting to hit the streets; they are ready to go.

Sales Management Training

It is crucial that you are ready to manage a salesperson before you hire one. By learning what needs to be done before you hire you will be prepared when you do. FSI has created dozens of sales management training webinars. Contact your business development consultant to have them create a list of webinars that will help you get started on the right foot.

Training Topics:

- Hiring and Recruiting
- Onboarding and Training
- Sales Management
- Sales Planning

Sales Goals and Metrics

In the sales management portion of the guide we have outlined expectations for sales goals and activities expected of a new salesperson. There is no time to waste and you should communicate that up front. An extremely high level of activity is required to be successful and successful sales managers establish those expectations on day one.

Sales Compensation Guidelines

You, the franchisee who will employ, manage and evaluate your salesperson, will need to design a compensation plan to attract, motivate and retain talented salespeople who meet your company's sales expectations.

Although compensation programs vary widely among franchisees, most fall into one of the following three models:

1. Base salary plus commission
   a. Most franchisees choose this compensation model because of its ease of use and its adaptability for various sales goals.
2. Guaranteed draw against commission
   a. This model is not usually recommended because, while it provides greater motivation to build sales quickly, the salesperson can be reluctant to spend necessary time on telemarketing, database management and administrative tasks.
3. Straight commission
   a. This model pays no guarantee and no draw. The salesperson earns a commission, usually 10%, on gross sales. This model is not often used with new salespeople because their revenues start out so low that even a 50% commission rate would not be enough to attract, motivate or retain the salesperson. Also, with no salary, the salesperson may see himself/herself as an independent salesperson or broker, rather than as a member of your staff. Since he/she is actually paying himself/herself, it is more difficult to require that time be spent on non-selling-specific activities such as database management and completing reports. This method presents greater management challenges.
   b. However, a veteran salesperson who is a top performer, and has put in the time and energy to perform at that level will often want to go to a straight commission structure. Proven top sellers know they can generate significant revenues for the company and want to be paid for performance. Should you choose this route, the most common method is to pay 10% on gross sales.

Broad Salary Ranges
Based on industry and network research; below are some general guidelines on what salespeople are being paid. This is a sample and may vary by market.

1. $30,000 - $36,000 plus 5-7% commission for a true raw rookie, an individual who has never sold before and whose ability is unknown.
2. $36,000 - $50,000 plus 5-7% commission for an individual with 2-5 years sales experience and a record of performance in B2B sales.
3. $50,000 plus 5-7% commission for an experienced, capable salesperson with 5+ years proven B2B sales success, perhaps working toward commission only at a 10% rate.

Your business management consultant and business development consultant can review your marketplace and help you decide on appropriate compensation offers.

Another compensation idea is to configure your offer to a salesperson based on what you are trying to accomplish for the business.

For example, is your primary need to generate additional, significant customers? Then you want to hire a salesperson whose strength is new customer acquisition and pay him/her accordingly. That probably means an average salary, but above-average commission rate.

If your need is for an account manager, who will be given a book of existing customer accounts to maintain and grow, an above average salary but lower commission rate, or a bonus in place of commission, may be more motivating.

Bonuses may be paid for meeting and surpassing sales goals or for promotions, efforts and performance. See the compensation considerations by career progression and by desired behavior matrix on the following pages, then consult with your BMC and BDC on specific plans for the individual you wish to hire.

Sales Compensation Considerations by Career Progression
These examples are based on industry and network surveys provided for informational purposes only.

Career Stage	Description	Compensation Model
Beginner/Trainee 0-2 years	Trainee with no print/signs/ marketing experience/no sales exp.	Salary + Commission $30-36K + 5% on gross sales
Mid Range 2-7 years	Salesperson has some experience and expertise. Stability and security.	Salary + Commission + bonus $36-50K + 6%
Experienced 7+years	Salesperson is knowledgeable, skillful experiencing continued learning and up-grading. Seeking better, more effective and more efficient ways. Developing a personal style and process.	Salary+ commission moving towards 10% commission only, established book of business

Sales Compensation Considerations by Desired Behavior

Hunter	Salesperson's primary purpose is customer acquisition: to find, qualify and convert prospects into new clients and to maximize those new clients.	Salary + Commission $30-36K + 7% for first year 3% years 2+
Farmer	As an account manager, sales rep is charged with maintaining existing client relationships, cross-selling and upselling to maximize those clients. Little expectation to hunt for new accounts	Salary + Commission $30-36K + 3% or bonus

Bonuses
Bonuses can be added to any compensation plan to stimulate greater overall sales or to promote sales of specific products or services. They can also be applied to generate increased activity in specific areas. Bonuses can be flat dollar amounts or percentages. The objective is to motivate the salesperson to push themselves, engage in a desired behavior and achieve higher sales.

Examples:
Product and Service based: choose a profitable product you would like to sell more of and offer cash bonus for selling it. Sell a $1,000 sign job and get $25 bonus. Sell an online ordering portal get $100.

Activity based: identify an activity that usually drives higher sales and give a bonus for doing that activity. Such as $20 for center tours, $20 for online ordering portal demos, $20 for adding 100 new prospects to AMP list, $100 for opening 10 new accounts in a month. Hunting bonus, additional 2% commission for the first year an account does business with the center.

Performance based: additional bonus paid for exceeding sales goals, for example: as exceed quarterly goal by 10% and get additional $500. Make Top Performers Club Gold get $250; make Platinum get $1,000.

Plan to Manage
In order to achieve long-term success all salespeople must be managed (even those that are successful) and coached. A plan must be in place to determine who in the center will be their manager and how that process will work. Your BDC will support, coach and assist during onboarding, however, cannot be a day-to-day manager of your salesperson. The process for managing a salesperson will be laid out in detail, but you must allot adequate time to manage and ensure success. Key areas for successful sales management include:

- Onboarding
- Weekly meetings
- Sales planning
- Sales strategy
- Monthly sales reports

Summary

By preparing before you hire, you will increase your salesperson’s chance for success and shorten the time it will take for them to become profitable. You will also be better positioned to manage them and track their activities.

4. Salesperson Hiring Process

The next section is a sample process developed to help you when you are ready to hire. When you feel you are ready to move forward and hire a salesperson; your BDC and BMC are available to support your efforts.

Pre-work:
1. Skills Profile
2. Job Description
3. Recruiting/Advertising

Hiring Process:
1. Resume Review
2. Phone Screening
3. Initial Interview
4. BDC Discussion
5. Salesperson Profile Testing
6. BDC/BMC Phone Interview
7. Second Interview
8. Background Check
9. Offer

Pre-Work

1. Skills Profile

A key component of hiring is an understanding what you are looking for a salesperson. No one person will be highly rated for every skill, but when assessing candidates and deciding who to hire you should consider what skills, attributes and work personal history they bring to your business.

Sales Skills	Personal Attributes	History
Presentation	Loyalty	Employment
Communication	Honesty	Salary
Planning	Persistence	Education
Consulting	Competitiveness	Computer Skills
Closing	Shows Initiative	Social Networking
Proposal Writing	Optimistic	Own a Car
Consultative Selling	Accountable	Driver's License
Solution Selling	Energy	Credit History
Decision Making	Adaptability	
Writing	Creativity	
Problem Solving	Confidence	
Record Keeping	Resilience	
Relationship Building	Open	
Strategic Selling	Intuitive	
Objection Handling		
New Business Development		
Negotiating		
Public Speaking		

2. Job Description

A clearly written job description with standards of performance is important to ensure that the salesperson understands their responsibilities and how performance will be measured. We have provided several samples for you to utilize and/or customize to fit your needs. See Section 7: Resources

3. Recruiting/Advertising

Referrals and networking

One of the best ways to find a sales representative is through referrals and networking. Tell everyone you know that you are looking for a salesperson and ask if they know anyone they would recommend to you. Include your vendors and their sales representatives, customers, other employees, contacts in organizations and civic groups to which you belong.

Bounty Program

Another way of getting qualified applicants is to offer a bounty to people you know and trust if you hire someone they recommend. Let vendors, sales reps and others know that you will pay them a $100 or $500 referral fee if you hire a qualified applicant, they send you. This works because people don't want to refer a bad person to you and its often a much cheaper and faster way to find applicants then placing an ad.

Online Advertising

We recommend you place an ad on the Sir Speedy/PIP/Signal Graphics national job boards and update the listing every 60 days. This way you are always ready to recruit a qualified salesperson. This ad is free and should always be running! Refresh on a regular basis.

We currently recommend using Indeed http://www.indeed.com to place ads for salespeople using both free-ads and paid ads to generate responses. Please contact your BDC for strategies to generate applicants on Indeed.

Employment Agencies or Headhunters

Another method is using employment agencies or headhunters. The benefit to you is that these sources are likely to have pre-qualified candidates ready to submit for your consideration. The source will have done the advertising, interviewing and testing, which will save you a considerable amount of time. And, they may offer a satisfaction guarantee that states that if the individual they place with you doesn't work out, he/she will be replaced at no additional charge. (please review contract as all are different) Using agencies and headhunters will cost you in fees, most often a guaranteed percentage of the salesperson's salary for a period of time ranging from six months to one year.

Sample Ads

Review the ads listed in Section 7 Resources and choose one you find appropriate for your center. No one ad is perfect and or magic; you will need to review each and take what you like and modify it to fit your center. After writing your ad, your BDC or BMC would be more than happy to review it before you post.

Hiring Process

A best practice in making a successful hiring decision is to have a pre-defined hiring process. Below is a sample of what that process might look like. It was designed to help you hire the right salesperson for your center. It has been set-up to avoid snap decisions and features multiple points for you to evaluate each candidate; a process such as this will help you make a sound business decision. Please contact your business development consultant if you have any questions.

1. Resume Review

Before contacting and meeting with candidates, you should spend some time screening for those that are best qualified. Review the information below and sort and score each resume.

Your objectives when reviewing resumes are:
- Reduce the time spent in the hiring process
- Eliminate the unqualified and overqualified
- Prioritize the best candidates

Screening considerations:
- Consistent work history
- Sales experience, B2B sales is especially advantageous
- College degree
- Vertical market sales experience
- Printing industry experience
- Marketing experience

Red Flags
- Erratic work history
- Accomplishments that don't seem justified
- Issues from Internet, social media checks

Knockouts
- Does not have required experience
- Too much experience or salary request outside your range
- False information on resume or application
- Typos, misspellings, punctuation, etc.
- Limited technology background

After reviewing the resumes, it is suggested you divide them into three groups:
1. Best candidates
2. Acceptable but not ideal candidates
3. Unacceptable candidates

2. Phone Screening

Save time by inviting only the best to come in for an actual interview. It is advised that you do a short phone-screening interview. If you like the person you can invite them to schedule an in-person interview. This way, you get a feel for the person and clarify any questions you might have about their resume.
- Tell them who you are and why you are calling
- Thank them for applying for the position
- Ask them what about the job interests them
- Ask them what about them would make them successful in the position
- Ask them about their compensation expectations and range
- If you like them and think you would like to move forward, ask them when they would be available for an interview.
- If you do not think they would be a good fit, confirm their email address and tell them you are calling other candidates and will email them with a time for an interview. Send them an email that you decided to pursue other candidates at this time and thank them for applying.

3. Initial Interview

The initial face-to-face interview is the pivotal step in the process. Great interviews don't just happen. Many owners do not plan for the interview. They just glance at the resume before the candidate comes in. Being prepared will help you better assess your candidate, as well as show you to be the professional that you are. Remember top sales candidates are interviewing you as much as you are interviewing them. If you want to attract the best candidates, you need to be prepared to sell yourself and your business as an employer of choice.

Interview Process
- Prepare thoroughly
- Establish rapport
  - o Greet them, make them feel welcome, like a guest in your home
  - o Avoid interruptions
- Confirm candidate's expectations and understanding of the position. Review the job description again

- Ask good questions about business and personal performance
  - o See Section 6 Resources for sample questions
- Ask if they have any questions
- Restate job opportunity
- Explain next steps in the process

Evaluation

At the conclusion of the interview, take a few minutes to make some notes about the candidate and the interview. Especially when interviewing several candidates over a period of days or weeks, it becomes difficult to remember specific strengths and/or weak points of a particular applicant. Notes will help, as will the following evaluation matrix.

Post Interview Candidate Evaluation Matrix

	Poor	Fair	Average	Good	Excellent
Poise	1	2	3	4	5
Personality	1	2	3	4	5
Speaking Voice	1	2	3	4	5
Appearance	1	2	3	4	5
Attitude	1	2	3	4	5
Interest in Position	1	2	3	4	5
Speed of Thought	1	2	3	4	5
Professionalism	1	2	3	4	5
Articulate	1	2	3	4	5

Sample Questions:

See resources in Section 7 for sample questions

4. Discussion with BDC and/or BMC

After the first interview call your BDC to discuss how the interview went:

- How did it go?
- What did you like?
- What did you not like?
- Any red flags?
- Is this a good fit?
- Can you envision them being successful at your center?
- Should you move forward or not?

5. Salesperson Profile Test

If you decide to move forward with this candidate, it is recommended that you order a Salesperson Profile Test. This is a third-party profile evaluation, full information on how the test work and its scientific basis and be found at www.salestestonline.com. The Salesperson Profile Test was developed to measure a sales candidate's profile against that of our top performing salespeople. It is not a personality test, nor is it a sales aptitude test and it was not designed to tell which of several candidates might be the best choice. What it does is tell you how a particular candidate matches the profile of our top performers.

You may order the test on the BMSS. Click on the link from the main page for Salesperson Profile Test. Complete the required information, including the credit card to be charged $27, and submit. You will receive an email with the URL, log-in and password for the candidate who may take the test from anywhere, anytime. Depending upon when the test is taken, you may receive the test report from your BDC within 24 hours. After receiving the test, your BDC is available to review the results and discuss its findings and offer their experience and insight.

6. BDC/BMC Phone Interview

Your BDC has extensive experience in interviewing and hiring and it never hurts to get a second opinion on your candidates. If the Salesperson Profile Test has come back acceptable and you want to move forward, then contact your BDC about conducting a phone interview. If they are not available, contact your BMC. This needs to be scheduled. Don't expect to call your BDC and hand the phone to the candidate. Setting a level of professionalism starts here. *During this interview, your BDC will establish that they are a consultant, they will share their opinions with the owner of the center they are applying with but will not be making a decision whether to hire or not.* Post-interview, your BDC will discuss the pros and cons of the candidate and provide you with feedback that will help you decide whether to move forward with the candidate.

7. Second Interview

You will want to do a second in-person interview. The objective of this interview is to:

- Discuss any concerns you or they may have
- Set expectations for what it takes to be successful at this position
- Determine if they are ready to do the job
- Assess if they want the job
- If you have two candidates you like, you may need an additional interview to decide which one to make an offer to

8. Background Check

Don't make a hiring mistake by not checking references. Whatever information you are able to get will be worth the effort. Remember that the person you hire will represent you and your center to the business community. You want the most capable, most presentable individual you can employ.

9. Offer

Prepare a professional offer letter and non-compete agreement to give to your candidate. (Sample available in Section 7)

This letter should include the following details:

- Job descriptions
- Work days, hours
- Expectations
- Compensation plan
- Start date
- Non-compete

This process should be evaluated by you and adjusted to meet the needs of your business. It has been provided as an example of best practices, but you as a business owner will need to decide what works for you and your business.

5. Onboarding

The next step in ensuring a successful hiring of a salesperson is the onboarding program. The objective of this program is:

- Increase the likelihood of their success's
- Have a plan to speed up a new salesperson development
- Insure the salesperson is meeting expectations
- Achieve profitability sooner
- Identify those who are unable to do the job sooner

Below is a sample 12-week plan, it will need to be adjusted to meet your center's specific needs, as well as the needs of your salesperson. As no two centers are the same, neither are any two salespeople. Your business development consultant can work with you to customize this plan.

For the first 12 weeks of your new salesperson's employment you can choose to schedule a weekly call with your business development consultant. This call is not mandatory but has been shown to help fast start a new salesperson. This is not a sales management call but a coaching call that is done in support of your onboarding program and sales management priorities.

The objective of this call is:

- Assess where they are at
- Are they doing the right activities
- Help them do the right activities better
- Identify training resources they need
- Identify resources they need to sell
- Support owner/manager with their priorities
- Provide ongoing feedback to both salesperson and owner/manager

Week 1 Day 1

1. Paperwork
    a. Terms of employment/pay/commission
    b. Employee handbook
    c. Professional attire and standards
    d. Non-compete
    e. Job description
    f. Training outline
    g. Cell phone
        i. Expectations
        ii. Rules of use

2. Setting Expectations
    a. Goals
    b. Activity
    c. Reporting

3. Company Introductions
    a. Company background and culture
        i. Introduce staff and roles
            1. GM
            2. CSR
            3. Graphics
            4. Digital print
            5. Press
            6. Bindery
            7. Delivery
        ii. Facility tour
4. Salesperson Work Area
    a. Computer
    b. Email
    c. Business cards, sales marketing materials
5. Phone Conference with BDC – **Owner/Manager on Call**
    a. Who is FSI and how we help
    b. Strategy
    c. Sales process
    d. BMSS
    e. What it takes to be a top performer
    f. Discuss available training webinars
    g. Schedule weekly calls

Week 1 Day 2

1. Review day 1 training
2. Production workflow
    a. Quotes/job orders
    b. Printsmith/PrintersPlan (PlanProphet)
    c. Review how to take a quote
    d. Quote process and expectations
    e. Turnaround time on quotes
    f. Review how to read a work order and invoice
    g. How jobs are delivered
    h. Billing and invoicing options
    i. Shadow CSR
        i. Understand their role in center
        ii. Discuss quotes and placing orders
3. Review your local website
    a. Log salesperson onto Internet to local.com website
    b. Have salesperson review all pages
        i. Products and services
        ii. Send a file
        iii. Request a quote
        iv. Blog

v. Local customization
vi. Case studies
vii. Videos

4. Watch appropriate webinars
5. Meet with owner/manager to review the day

Week 1 Day 3

1. Review day 2 training
2. Production workflow
   a. Shadow graphics
      i. Understand graphics role
      ii. Understand how digital files get to center
      iii. Pre-flighting and troubleshooting files
      iv. Best practices for optimum output
3. Watch appropriate webinars
4. Download, read and study assigned training materials
5. Meet with owner/manager to review the day

Week 1 Day 4

1. Review day 3 training
2. Production workflow
   a. Shadow production digital/press/bindery
      i.dUnderstand each person's role
      ii. Understand how we produce what we produce
      iii. Speeds/feeds/handwork
      iv. Equipment capabilities
      v. Introduce paper
      vi. Show samples of work and discuss how it was produced
      vii. Inhouse vs outsource

1. Why we do it that way
2. Who does it go to and why
3. Getting quotes and working with vendors
4. Mark-up for outsourcing and why
3. Watch appropriate webinars
4. Download, read and study assigned training materials
5. Meet with owner/manager to review the day

Week 1 Day 5

1. Review day 4 training
2. Production workflow
   a. Signage/large format
      i. Equipment and production
      ii. Understand what we sell
      iii. Inhouse

iv. Outsource
b. Mailing services
i. Equipment and production
ii. Understand what we sell
iii. Inhouse
iv. Outsource
3. Watch assigned webinars
4. Download, read and study assigned training materials
5. Meet with owner/manager to review the week 1
6. Turn in weekly report

Week 2 Day 1

1. Meet with owner/manager
   a. Questions from week 1
   b. Review production workflow
   c. Review quotes/orders
2. Drive territory with owner/manager
   a. Review key prospect accounts
   b. Discuss house accounts not to be called on
   c. Identify primary areas to target prospecting
   d. Discuss best types of customer
3. Dormant/current accounts
   a. Review list of dormant accounts to call on
   b. Review list of house accounts rep will service, if any
4. BDC meeting
   a. Review training completed
   b. Discuss challenges and needs
   c. Assess and assign training webinars and support materials to study
5. Watch appropriate webinars
6. Download, read and study assigned training materials
7. Meet with owner/manager to review the day

Week 2 Day 2

1. Review previous day's training
2. Production workflow
   a. Shadow CSR ½ day
3. Review sales plan strategy, templates and scripts, modify and adjust, if needed
   a. Cold call in-person strategy
   b. Research/qualify
   c. Phone calls
   d. Emails
   e. Printed collateral to mail
   f. Drop by visit
   g. Website share

h. Hand written card
i. Evaluation
4. Watch appropriate webinars
5. Download, read and study assigned training materials
6. Meet with owner/manager to review the day

Week 2 Day 3

1. Review previous day's training
2. Owner/manager review center marketing plan
    a. Automated Marketing Program (AMP)
        i. What it is, how it works
        ii. Adding names to the list
    b. Paid search
        i. Leads from call in
        ii. Keep updated prospect list so if someone calls in, they know it belongs to the salesperson
    c. Newsletter mailings/email
        i. How it works, who manages
    d. Other mailing, advertising and marketing
3. Watch appropriate webinars
4. Download, read and study assigned training materials
5. Meet with owner/manager to review the day

Week 2 Day 4

1. Review previous day's training
2. Owner/manager review ideal customer criteria
    a. Center specific vertical expertise?
        i. What your center does well
        ii. What your center does profitably
    b. General industries to target
        i. Associations and Organizations
        ii. Banking
        iii. Healthcare
        iv. Higher Education
        v. Manufacturing
        vi. Retail
        vii. Non-profits
        viii. Dental Services
        ix. Hospitality
3. Watch appropriate webinars
4. Download, read and study assigned training materials
5. Meet with owner/manager to review the day

Week 2 Day 5

1. Review previous day's training

2. Preparing to sell
    a. Materials ready
    b. Target area defined
    c. Review talk tracks
    d. Review objection handling
    e. Review value statements
3. Review onboarding and training with owner/manager
    a. Is salesperson ready to go?
4. Turn in weekly report

Week 3 Day 1

1. Share daily plan with owner/manager
2. Implement sales plan
3. Contact assigned accounts
4. Contact dormant accounts
5. Track activities for reporting
6. Review activities with owner/manager

Week 3 Day 2

1. Share daily plan with owner/manager
2. Implement sales plan
3. Contact assigned accounts
4. Contact dormant accounts
5. Track activities for reporting
6. Review activities with owner/manager

Week 3 Day 3

1. Share daily plan with owner/manager
2. Implement sales plan
3. Contact assigned accounts
4. Contact dormant accounts
5. Track activities for reporting
6. Review activities with owner/manager

Week 3 Day 4

1. Share daily plan with owner/manager
2. Implement sales plan
3. Contact assigned accounts
4. Contact dormant accounts
5. Track activities for reporting
6. Review activities with owner/manager
7. Meeting with BDC
    a. What is working/not working

b. Review training completed
c. Discuss challenges and needs
d. Assess and assign training webinars and support materials to study

Week 3 Day 5

1. Share daily plan with owner/manager
2. Implement Sales Plan
3. Contact assigned accounts
4. Contact dormant accounts
5. Track activities for reporting
6. Review activities with owner/manager
7. Turn in weekly report

Weeks 4-16 Same as Week 3

Initial Sales Plan

It is recommended that the new salesperson's selling plan include these four elements:
1. Assigned Accounts
2. Dormant Accounts
3. Target Accounts
4. Prospecting New Accounts

Assigned Accounts:

Owner Responsibilities:
- Select 15-25 current accounts with growth potential
- Owner to provide current annual volume for each account
- Owner to set growth goal for each account
- Owner to provide contact information for each account
- Owner to provide sales history
- Owner will review, discuss, assist and manage activity for these accounts

Salesperson Responsibilities:
- Contacting each account and setting appointment
- Assess, develop and grow account
- If account fails to grow and/or salesperson is not actively moving the account sales forward, the account returns to the house
- If not a viable growth account, give back to the house
- Salesperson will provide weekly updates on activity for these accounts
- Salesperson is responsible for tracking each account through appointment setting process utilizing CRM system

Dormant Accounts

Owner Responsibilities:
- Select 25 dormant accounts with growth potential
- Owner to set growth goal for each account

- Owner to provide last known contact information for each account
- Owner to provide sales history
- Owner will review, discuss, assist and manage activity for these accounts

Salesperson Responsibilities:
- Contacting each account and setting appointment
- Assess, develop and grow account
- If account fails to grow and/or salesperson is not actively moving the account sales forward, the account returns to the house
- If not a viable growth account, give back to the house
- Salesperson will provide weekly updates on activity for these accounts
- Salesperson is responsible for tracking each dormant account through appointment setting process utilizing CRM system

Target Accounts
Owner Responsibilities:
- Select 25 prospects in their territory that could provide significant revenue to the center
- These target accounts currently do not do business with the center and may or may not have ever done business with the center
- Target accounts represent long-term growth accounts
- Owner will review, discuss, assist and manage activity for these accounts

Salesperson Responsibilities:
- Contacting each account and setting appointment
- Assess, develop and grow account
- If account fails to grow and/or salesperson is not actively moving the account sales forward, the account returns to the house
- If not a viable growth account, give back to the house
- Salesperson will provide weekly updates on activity for these accounts
- Salesperson is responsible for tracking each target account through appointment setting process utilizing CRM system

Prospect Quick-start Plan
Salesperson Responsibilities:

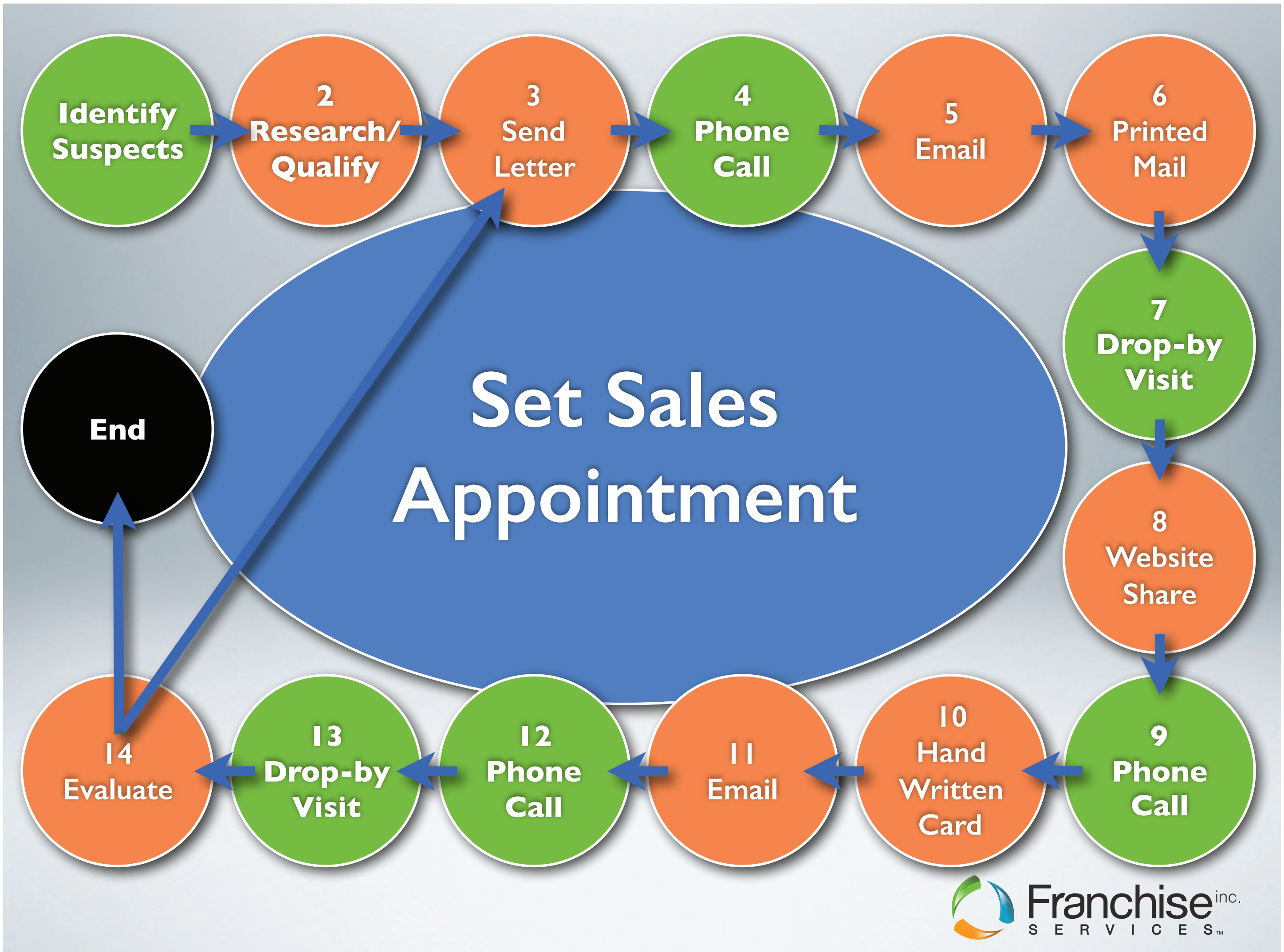
During the first five weeks of field activity, the salesperson will be responsible for identifying 100 new prospects.
- Identify 20 per week (4 per day) of qualified prospects
- It may take 40-100 suspects to get 20 qualified prospects
- Once identified as a qualified prospect, they should go into the appointment setting process
- If it is determined that one of these prospects is no longer a viable prospect, the salesperson is responsible for replacing with another prospect
- Objective is to always have 100 prospects in the appointment setting process
- Salesperson is responsible for setting up an appointment with each prospect on the list
- Salesperson is responsible for tracking each prospect through appointment setting process utilizing CRM system

Owner Responsibilities:
- Owner will review, discuss, assist and manage activity for these prospects
- Owner will provide ongoing marketing support for these prospects

Appointment Setting Process
The primary key to success for all salespeople is having pre-set appointments with qualified prospects and accounts. Top salespeople set 10-15 appointments per week (2 or 3 per day). In order to set this many appointments, it takes 40-50 contacts per day at minimum. For many reps this number could be higher.

Minimum daily goals for appointment setting:
- Phone calls: 10-15
- Emails: 10-15
- Letters/cards/other mail: 10-15
- In person cold-calls/drop-ins: 10-15
- Total minimum daily expectation: 40-60 contacts

If the below appointment setting process is utilized for contacting prospects every 7-10 days and a salesperson has sufficient prospects in their database, this level of activity should be reached each week. The process should be set up in the CRM you are using to allow the salesperson to schedule and track their progress.


Identify Suspects
2 Research/ Qualify
3 Send Letter
4 Phone Call
5 Email
6 Printed Mail
7 Drop-by Visit
8 Website Share
9 Phone Call
10 Hand Written Card
11 Email
12 Phone Call
13 Drop-by Visit
14 Evaluate
End
Set Sales Appointment
Franchise inc. SERVICES

6. ONGOING TRAINING AND ASSESSMENT

Helping salespeople do the right things and do them better is the key to long-term growth. It is imperative that salespeople be consistently assessed and coached to improve what they do. In this section, we will list the skillsets and mindsets that can be trained or coached. Engage your BDC for support in implementing training and coaching on the following training and coaching topics:

Prospecting
Appointment setting
Cold calling in person
Cold calling on phone
Creating a compelling message
Effective emails
Getting past the gate keeper
Ideal customer criteria
Identifying decision makers
Knowing the competition
Lead qualification
Networking
Pipeline planning
Referrals
Research
Sales process
Storytelling
Time management
Understanding your buyer
Using a CRM
Using social media
Discovery and Needs Analysis
Appointment preparation
Active listening
Adapting communication style
Client engagement
Confirming/summarizing
Demonstrating empathy
Knowing when to shut up
Open-end/close-end questioning
Product knowledge
Relationship building
Solution selling
Tailoring needs analysis to buyer
Understanding business objectives
Vertical market expertise

Educating and Positioning
Asking for and getting feedback
Business communication
Challenging status quo
Creating effective proposals
Effective presentation skills
Establishing credibility
Giving effective demonstrations
Knowing your value propositions
Recognizing buying signals
Sales presentations/demos
Upselling and cross-selling
Using trial close questions
Objections and Closing
Asking for the sale
Contract negotiation
Getting internal buy-in
Know stakeholders and why they buy
Navigating tough negotiations
Overcoming “not now”
Positioning against a competitor
Price objections
Follow-up and Service
Account management
Conflict management & resolution
Consistently adding value
Cross-sell and upsell
Customer Success
Future planning for growth
Managing expectations
Quarterly business reviews
Responding to unsatisfied client
Taking customers for granted
Thanking the client
Time management

Selling Mindset

Adaptable	Determined	Inspirational
Ambitious	Empathetic	Intuition
Approachable	Engaging	Passionate
Coachable	Friendly	Positive attitude
Collaboration	Goal oriented	Problem solving
Commitment	Grit	Responsible
Competitive	Growth	Self motivated
Confident	Helpful	Sociable
Creativity	Honesty	Tough
Critical thinking		

7. Resources

Included in this section:
- Network Average Annual Sales
- Salesperson Recruitment Ads
- Sample Job Descriptions
- Sample Offer Letters
- Sample Interview Questions
- Lead Generation Resources

Network Average Annual Sales for Salespeople

Average Sales of a First Year Salesperson = $215,000

Month 1	$ 3,750
Month 2	$ 6,100
Month 3	$ 8,100
Month 4	$ 10,500
Month 5	$ 12,800
Month 6	$ 15,400
Month 7	$ 18,100
Month 8	$ 21,000
Month 9	$ 24,400
Month 10	$ 28,350
Month 11	$ 31,600
Month 12	$ 34,900

Sales Averages for Years 2-5

Year 2	$ 315,000
Year 3	$ 400,000
Year 4	$ 475,000
Year 5	$ 550,000

Salesperson Recruitment Ads

SAMPLE AD 1:
New Business Account Executive

Position Overview:
This is a new business development position, otherwise known as outside sales. Our XX-year-old, family-owned company continues to grow and has an opening for a business account executive that will be responsible for acquiring and supporting the marketing, print & sign needs of business-to-business clients. If you are still interested, make sure to read this entire listing.

Some of the activities of the position include qualifying leads, sales appointments, proposal presentations and follow up. The ability to use technology including computers, the Internet, social media and email are integral to the role. You will be required to make phone calls to people you do not know, you must be willing to call and call and call again. Seriously, if you are not willing to follow-up you should not apply.

Success in this position will require you to create business conversations with complete strangers; many of whom won't want to talk to you, it is not easy. If you are looking to punch a timeclock and collect a paycheck, this is not the job for you.

The right candidate has experience in B2B sales, new account development and account management. Important traits will include being energetic, positive, self-motivated, detailed and a strong people person. Background in print, marketing, signage, direct mail or promotional products is a plus.

We understand that your success is our success, and we provide the support you will need to excel, including:
- Onboarding program to speed your success
- Full integrated marketing campaign to support your efforts
- Exciting work environment where company success is shared with the team
- We ensure that you will have the tools you need for success from technology to marketing
- Opportunities for national recognition and awards
- Ongoing support and training
- Incentives and rewards for accomplishment

The Important Stuff You Must Have:
You must be nice to the people who are our customers and those that you work with even when they do not deserve it
- Be a good communicator - in person, on the phone and able to compose an email that does not look like a third grader wrote it
- A basic understanding of modern technology including the ability to use the Internet
- Like to work, and work while at work (a post to Instagram won't kill anyone as long as you get your work done)
- Be a multi-tasking Ninja, we do a lot in a short amount of time, this is no place for the proactively challenged
- Basic math is a must, but yes you can use a calculator
- Must be willing to jump in and figure things out on your own, no hand holding here
- You must be a life-long learner to work here. Lots to learn and it is always changing
- Willingness to pick up the phone and call someone, then call again and then make another call, seriously you must talk on the phone to people and initiate conversations

Big Pluses If You Have:

- Sold stuff B2B or at least know what B2B is
- Any kind of graphic design or past print experience
- A background in the sign industry
- Understanding of direct mail and the data that drives it
- Software experience with the Adobe Creative Suite or Microsoft Office
- Utilized a CRM system

About Us:

We have been in business in City for more than XX years now and our franchise company Sir Speedy/PIP/Signal Graphics has been in business over 50 years, so we are not going anywhere. We have led the way in our franchise and have a ton of nifty awards and trophies to prove it. We do a lot of cool projects that I bet would surprise you for some of the area's biggest companies. We bet you will be surprised at what we can do, and you more than likely will immediately want to come work here. Thanks for reading this far, we know it was a lot of words. If you read this far use the key word TITAN in your subject line for priority review.

SAMPLE AD 2:

Are you the integrated marketing consultant we are looking for?

(Your Brand and City), is part of the world's largest network of printing and marketing service centers. For all our (years in business) years, we have provided exceptional service and outstanding quality to our growing customer base, which ranges from Fortune 500 corporations to home-based businesses. We are in search of an integrated marketing consultant.

Your Brand is dedicated to help our customers and prospects more effectively grow profitable sales.

- We act as an expert, consultant and resource allowing customers to concentrate on building their own business
- We always keep pace with technology
- We offer integrated cross-media direct marketing programs, web-to-print solutions and traditional services such as: mailing and fulfillment, graphic design, printing, copying, finishing, posters and banners

This is the ideal position for the marketing professional who understands business development and marketing, but especially enjoys working with people. The ideal candidate is well versed in direct and online marketing, backed by an ability to develop and implement marketing solutions that drive business sales. Growing our sales will be your primary responsibility. We are looking for someone to help create and develop new business opportunities using a consultative selling approach and managing a sales pipeline.

We are looking for someone with:

- Strong marketing skills, including the ability to recommend integrated marketing communication plans that drive sales
- Superior listening skills that allow you to learn about a client's business challenge and then work with them to create an effective solution
- Excellent communication skills, both written and verbal
- The ability to establish and maintain business relationships
- Who can interact with courtesy and sensitivity to overcome objections with persuasion and persistence?
- That can effectively coordinate cross-functional and cross-business teams to achieve a desired result
- A customer-focused attitude, demonstrated by a commitment to creating raving fans

- Computer literacy in business applications, Internet use and social media
- Proven record of being a team player
- A strong sense of urgency that stays focused under pressure.
- The ability to work and thrive in a fast-paced environment

We offer:
- Salary + commission and benefits
- Sales leads and accounts
- An integrated marketing program to support your efforts
- Regional and national training resources
- The best name and reputation in our industry
- National awards and recognition

For prompt, personal, consideration, email your resume to (your email). We will review all resumes, conduct a phone screening and have subsequently interviews for those fitting our criteria. No phone calls or visits please.

SAMPLE AD 3:
Corporate Account Manager

Position Overview:
Establish and maintain profitable relationships with customers on behalf of the company, actively prospect for new accounts and maximize sales potential with existing customers. Represent the company by conveying expertise in our services and establish a relationship with the community and business accounts. Establish yourself as the face of the business with our corporate accounts.

Primary Responsibilities:
- Manage an existing group of current accounts to maximize revenue and exceed customer expectations
- Identifying, qualifying and prospecting for new corporate accounts
- Effectively manage a sales pipeline
- Present and discuss the products and services of the company in a way that conveys an image of quality, integrity, superior understanding and fulfillment of customer needs
- Develop annual sales strategy in conjunction with management
- Become a subject matter expert in our industry
- Communicate effectively with your support team to achieve customer success
- Some out of state travel required for specific training events

We will provide:
- Competitive salary and benefits
- Initial and ongoing training
- Recognition and rewards for your achievements
- An integrated marketing program to support your efforts
- New leads and opportunities
- Top notch production support and resources

Our Expectations:
- Show up prepared and ready to work
- Commitment to our customers' success
- An ability to learn and adapt in a fast-paced environment
- Desire to be part of a winning team

For consideration please email resume to: owner@mybrand.com

SAMPLE AD 4:
Outside Sales Representative

If you have experience with outside sales to small and medium-sized businesses and want full time employment, this may be just what you are looking for. Your Brand, Print, Signs and Marketing has an opening for an outside sales representative.

We are a full-service marketing, sign and print media company and have been in business for more than 50 years. We help our customers grow their business by offering signs and banners, full color printing, copying, variable printing, promotional items, mailing service, graphic design and marketing programs. See for yourself at www.sirspeedy.com. You will be responsible for prospecting new accounts (cold calls), qualifying prospects, making sales presentations to prospects and reviving dormant accounts.

Good opportunity for growth, salary, plus 10% commission, bonus, paid holidays and medical.

For prompt consideration, send resume to: owner@localsirspeedy.com

SAMPLE AD 5:
"Sales Hunter Wanted. Read closely! We know who can and will succeed. Career position. Great income!

Does the following describe you? If so, get ready to apply.

You are looking for a well-respected company with a reputation for high quality that continues to grow?

You have a proven track record for finding and closing new business?

You know how to prospect, and you do it constantly and successfully without supervision?

You are great at "getting in the door" and can handle early-stage resistance from prospects.

You know how to shorten a long sell cycle (three-plus months).

You are a value seller and can hold margin against lower-priced and stiff competition.
You build relationships throughout the customer's organization at multiple locations and facilities allowing you to build repeat business over time.

We will be hiring the right candidate who is looking for a home. Successful experience selling multi-project campaigns at the director and C levels should be demonstrated. Experience selling custom manufacturing, commercial printing, visual graphics packaging, business services, media or commercial advertising a plus.

Prior earnings of $XX, XXX (base plus commission) where at least half came from commissions also a plus.

This is an outside sales position at XXX, located in XXXX, however, your ability or requirement to work from a remote location in the region will be strongly considered.

If this describes you, we want to hear from you as soon as possible. Please email your resume, statement of interest including prior earnings and any other important information about you to owner@mybrand.com If you are the ideal applicant, you will hear from us right away!

Within three business days of applying, you will be sent a link to complete an online sales assessment (which you have done in the past). No candidate will be considered without completing the assessment.

Pay: $XX, XXX - $XX, XXX per year

Benefits:

XXXXXXX

Sample Job Descriptions

Salesperson: establish and maintain profitable relationships with customers on behalf of the company. You will identify suspects, qualify prospects, convert prospects into customers and create maximized customers. Professionally represent the company at all times by conveying expertise in our products and services.

Primary Responsibilities:
- Find and create new sales opportunities within prospects and existing customers
- Advance those opportunities through schedule appointments and solution selling
- Align our products and services to help our customers meet their business objectives
- Effectively communicate with your support team to ensure customer satisfaction and on time delivery of services
- Stay up-to-date on industry, technology and trends
- Manage your sales pipeline to meet sales goals
- Develop rapport and build relationships with local business community
- Other duties as assigned by manager

Expectations:
- Conduct 10 pre-set prospect/customer appointments per week
- Make 50 pro-active sales touches per day to set 10 appointments per week
- Maintain records in provided CRM tool
- Create a minimum of five new accounts per month
- Meet monthly sales quota
- Create and execute with support of management a daily, weekly, monthly and annual sales plan

- Accurately provide specifications for all customer projects
- Follow-up with all prospects and customers with a sense of urgency and in a timely manner

Sample Offer Letters

Date

Full Name
Address 1
Address 2

Dear First Name,

We are very pleased to extend you this offer to join the XXXX team. This letter will confirm our understanding regarding your association with us. Your position will be new business development representative with a start date of Month Day, Year.

Your compensation will be a monthly salary of XXXX to be paid on XXXX. You will also be paid commission based on the below structure. Commission to be paid in the month following billed sales.

Commission Structure:

- You will receive X% on gross sales of all jobs not including tax or USPS mailing charges
- You will receive full commission on all in-house jobs that are sold at or above approved pricing
- You will receive full commission on all jobs which are brokered or brokered in part, where there is at least a XX% mark-up
- Any and all discounting must be approved and may result in a lower commission to be determined at the time of the discount

You will be compensated for car expenses at the rate of. xx cents per mile, or we will provide a monthly allowance to cover mileage expenses. Client gifts and entertainment expenses will be reimbursed contingent upon prior approval by your sales manager. We will also supply a company cell phone and computer for your use.

You will be eligible for enrollment in our employee benefits package, which includes group health medical insurance, after 90 days of service. We also offer a Simple IRA plan that you will be eligible to participate in. I will have a benefits summary sheet for additional highlights of benefits available to you.

You will be eligible for X week(s) of paid vacation after one year of employment, X weeks of paid vacation after two years of employment, and X weeks paid vacation after five years of employment. Compensation of vacation is based on prior 52 weeks of average sales volume.

Your monthly goals are as follows and will be reviewed and will be updated annually:

Month 1	$4,125
Month 2	$6,710
Month 3	$8,190
Month 4	$11,550
Month 5	$14,080

Month 6	$16,940
Month 7	$19,910
Month 8	$23,100
Month 9	$26,840
Month 10	$31,185
Month 11	$34,760
Month 12	$38,390
Total:	$215,000

Please sign this letter, complete any additional hiring paperwork and return back to me. I am truly excited about the opportunities that lie ahead for you at XXXXX. I am expecting great things from you.

Sincerely,

XXXX
Owner
XXXXXXXXXX

I understand the terms of the offer letter and accept.
I also understand that my employment is at will.

____

Salesperson Name Date

Sample Interview Questions

- Since you have decided to make a job change, what criteria are you using to select your next employer?
- What can you tell me about our company?
- From reviewing our website, what is one change you would suggest we make to the site and why?
- What did you do to prepare for this interview today?
- Why do you feel you are the best person for this role?
- Share an experience when you lost a sale. What did you learn from it?
- What three words would your sales manager use to describe you?
- Did you have to generate your own leads. How do you generate leads?
- When prospecting, what is your approach to setting a meeting?
- Why do you think people buy from you?
- No one is perfect… What is the one thing you are working to improve upon?
- What do you do to improve your sales skills?
- How do you research prospects before calling them?
- If I were to speak with your manager, what would be the one thing that he or she would say is your biggest weakness?
- If I were to speak with your manager, what would be the one thing that he or she would say is your biggest strength?
- What is your greatest sales achievement? What made it special?
- What do you feel it takes to be successful in sales?
- Of all of the careers you could select, why sales?
- In your current sales role, how do you qualify an opportunity?
- Share a goal that you set and how you achieved it. What do you attribute to your success?
- Share a goal that you set, but failed to achieve. Why did you fail? What did you learn?
- Part of what makes our business successful is being responsive to the market, which means constant change. How do you deal with change?
- How do you stay organized?
- What is it about your background and skills that tell you that this opportunity is a great fit for you?
- What do you think it takes to be successful in this sales role?
- What message do you leave on a prospect's voice-mail to receive a return call?
- Rejection is a big part of sales. How do you recover?
- How do you overcome your top competitor?
- Where do you see your sales career in five years?
- What's the most common/objection you experience when selling for your current company? How do you handle it?
- What is it about this opportunity that intrigues you?
- What CRMs have you used in the past and how have they helped you sell more?
- In your current and past sales roles, who were the ultimate decision-makers (level) for your offering?
- How do you manage your territory so you call on the right prospects at the right time?
- In your current sales role, what metrics do you use to keep yourself on track to achieve the annual sales goal?
- Share a time when you had to come up with a creative solution for a prospect.
- How do you create value with your clients?
- Why are you planning to leave your current sales role?
- Describe your typical sales day (or week)?
- How much time do you dedicate to prospecting for new business each week?
- Share with me a time when you had a frustrated, upset client that was on the brink of leaving for a competitor. How did you handle it?

- Share with me a time when you developed an account from scratch. Walk me step-by-step through the chronology of events that led to your being awarded the account.
- How would you describe your selling style?
- How do you stay up to speed on the news and trends in your industry?
- What is the largest sale that you have ever won?
- Share a time when you took a small, current client and turned them into a large account.
- What one factor do you attribute to your success?
- What is your sales call preparation plan?
- What would be your plan to learn our industry?
- Who was your best mentor? How did they impact you?
- How do you feel salespeople should be managed?
- How have you used social media to generate leads?

Lead Generation Resources

Sapper Consulting
Blake Vernon
Blake.vernon@sapperconsulting.com

Revity Consulting
Morgan Smith
msmith@revitysc.com

CoPilot
Jeff Hsu
jeff@copilotadvisor.com