



# THE CHANGING SALES ENVIRONMENT: LEADING YOUR REMOTE SALES TEAM TO MAXIMUM RESULTS

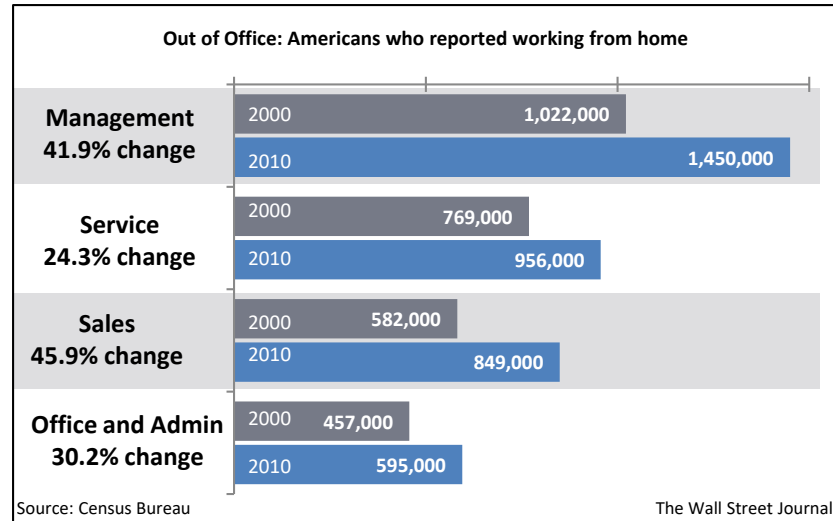
*2016 Remote Sales Effectiveness Study Summary of Findings*

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## The Changing Sales Environment

- In the past twenty years, the work environment for professional sellers has changed dramatically. Some drivers of the change:
  - Advancements in technology that allow work from anywhere.
  - A generational shift with the introduction of millennials to the workforce. These millennials have a higher focus on work-life balance and prefer a results-only work environment.
- Together, these drivers have expedited the shift to a more remote and virtual office working environment in sales roles. According to the 2010 U.S. Census, the number of sales workers who reported working from home increased 45.9% from the level of 2000 (see chart).
- The goal of this study is to understand the impact on sales management and sales leaders.
  - What do top performers do differently from their lower performing peers?
  - What can sales managers of remote sales teams do to affect performance?
- To get answers to these important questions, our research collected responses from all levels of sales organizations. Participants were asked to provide input by completing a survey that allowed them to provide perspective on their role as well as other roles in the sales organization. Responses were gathered from over 80 companies across industries.

## 2000-2010: Sales Added 267,000 More Remote Workers



## Research Focus

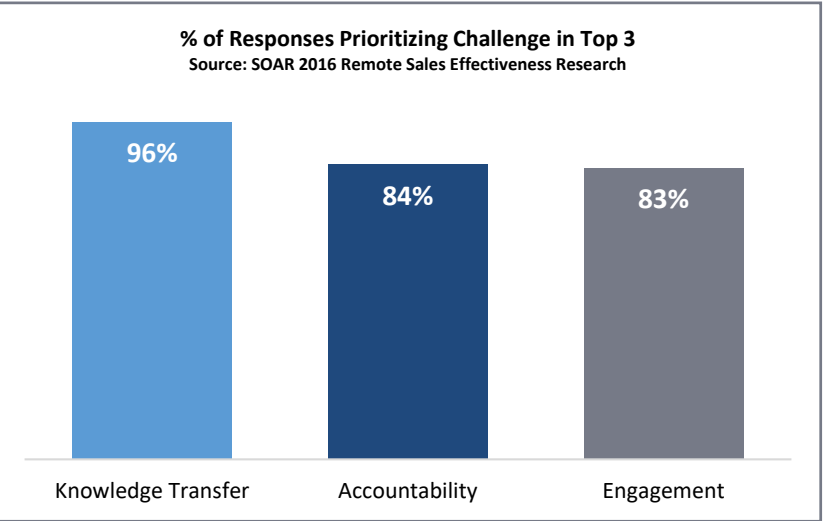
1. What are the biggest potential challenges in a remote sales environment?
  - Sales leadership and management view
  - Sales person view
2. How frequently do managers interact with their sales team for these types of engagement?
  - Routine Communication
  - Goal Setting & Feedback
  - Individual Sales Skill Development
  - Team Sales Skill Development
3. How do managers facilitate knowledge transfer with a remote sales team that is similar/equivalent to that which takes place around a 'traditional' office?
4. How do managers approach engagement to deliver maximum results?



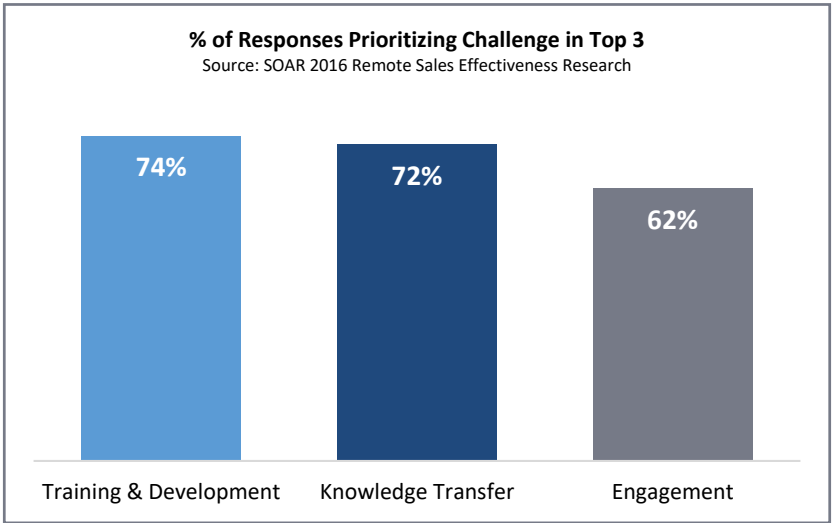
### External Perspective on Remote Challenges

- According to Global Workplace Analytics, some key reasons for the switch to remote work:
  - Cost savings associated with eliminating or downsizing the physical office
  - Increased focus on work-life balance
  - Ability to attract and retain top talent
- According to the Forbes article about the disadvantages of remote work (“How to Beat the Five Killers of Virtual Working”), the 5 disadvantages are:
  - #1 = “Lack of everyday non-verbal, face to face communication”
  - #2 = “Lack of social interaction”
  - #3 = “Lack of trust”
  - #4 = “Cultural clashes”
  - #5 = “Loss of team spirit”

### Top 3 Challenges of Managing a Remote Sales Force Found In Our Research (Sales Manager/Leader Perspective)



### Top 3 Challenges of Selling Remotely Found In Our Research (Salesperson Perspective)



### What This All Means

- For the sales manager, the team is not simply a ‘walk down the hall’ away. They are not at their desk. They may not even have a desk. You might not even have a physical office. The ‘water cooler’ opportunities for sharing stories of account wins and losses no longer occur to help with knowledge transfer, training and development.



- The primary advantage of an office is the informal conversation and knowledge transfer that occurs within those four walls. As you progress through this report, ask yourself: “What am I doing to recreate these communication touchpoints?”

# MANAGING REMOTE SALES PEOPLE MORE EFFECTIVELY

## Increase Engagement with Decreased Time Face-to-Face: Making Engagement a Process

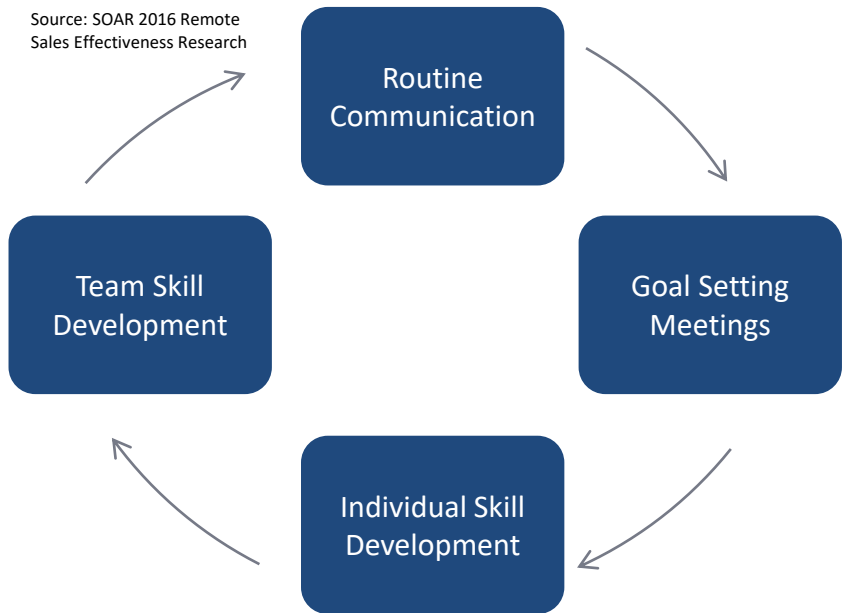
**Top performing remote sales organizations emphasize and execute engagement as a connected process instead of a series of events.**

The top performing sales managers and sales leaders understand that engagement is a process and this was validated by the research data. The data analysis shows that managers start the engagement process with routine communication. The top performers also conduct monthly goal setting sessions with the members of their team and schedule monthly sales skill development. The top performers recognize that routine communications matter and that the frequency of routine communications drives the frequency of the other parts of the engagement process (goal setting, individual skill development, and team skill development). Warning: Our research data shows that when routine communications decreases, the other three components of engagement will likely decrease. Managers sometimes decide to decrease routine communications when the team (or individuals) are performing well. On-going skill development affects sales performance. If a manager decides to decrease routine communications, the frequency of the other engagements should remain the same to maintain the level of performance.

Managers that manage engagement as a process are also better appreciated by their sales team. Among the salespeople surveyed, satisfaction levels with routine communication, goal setting, and skill development moved in parallel to their agreement with the statement “My manager follows a process of engagement.”

### The Engagement Process

Source: SOAR 2016 Remote Sales Effectiveness Research



### Best Practices

#### Scott, Regional Sales Manager, Dallas

Scott stated that he takes engagement very seriously. To ensure that he stays on top of the frequency of engagement with his team, Scott has made it a metric he tracks for himself.

Scott tracks engagement with the team. His engagement plan for each sales person includes:

- Routine communication at least 2 times per week
- Goal setting at least 1 time per month
- Individual sales skill development at least 1 time per month
- Team sales skill development at least 1 time per quarter

By following this process and tracking the execution, his sales people are more empowered to use the time more effectively. In addition to their latest sales calls, Scott is often able to use the routine communication time for coaching and individual informal training. With every conversation and call, his goal is to engage his sales people and help give them the tools to be successful. Over the last three years, his division has averaged 120% of their revenue quotas.



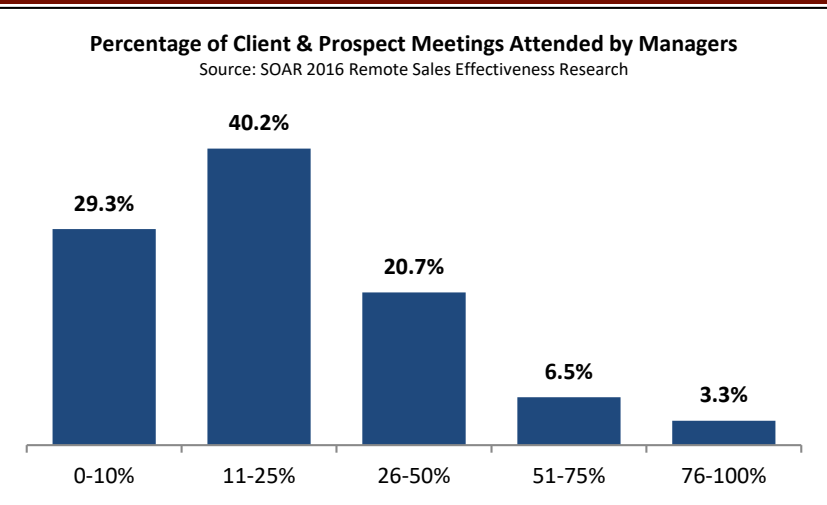
## Increase Time Face-to-Face and Engagement By Meeting Sales People for Client & Prospect Meetings

**Top performing managers of remote sales teams spend more time in customer facing interactions.**

69.5% of the sales managers and sales leaders that completed the survey stated that they attended less than 25% of client & prospect meetings and calls. Of those, 29.3% attend less than 10%. Our survey data showed that increasing attendance from 0-10% to 11-25% leads to an average increase of 8.5% in individual sales person quota achievement. Further, going from 11-25% to 26-50% yields another increase of approximately 8.5%.

Attending client & prospect meetings with sales people is a recommended way to create face-to-face engagement with the sales people. Spending a full day with the sales person (breakfast, transit time, lunch, meetings, etc.) allows for informal conversations that help the sales manager get to know each sales person better and identify their unique attributes, strengths and weaknesses. This knowledge and observations from the meetings can be used to tailor coaching sessions for higher impact individual skill development.

### Moving from 0-10% to 11-25% Boosts Sales by 8.5%



**69.5% of Managers Attend Less Than 25% of Their Teams' Sales Meetings with Clients & Prospects**

### Best Practices

#### **Kevin, Region Sales VP, Atlanta**

“Leading from the front” was the term our president, Charlie Thackston, heard when he crossed paths with the Eastern Region Sales VP for a growing software solutions provider. This was on a flight from Atlanta to Dallas where they just happen to be on the same late night flight of the road warriors. When asked why he was on this late night flight, the VP answered, “I am leading from the front”.

The VP was going out to be with the team to provide coaching, support and leadership for their success. Being out front with the troops provides the ‘in action’ observations and coaching opportunities for individual and team growth.



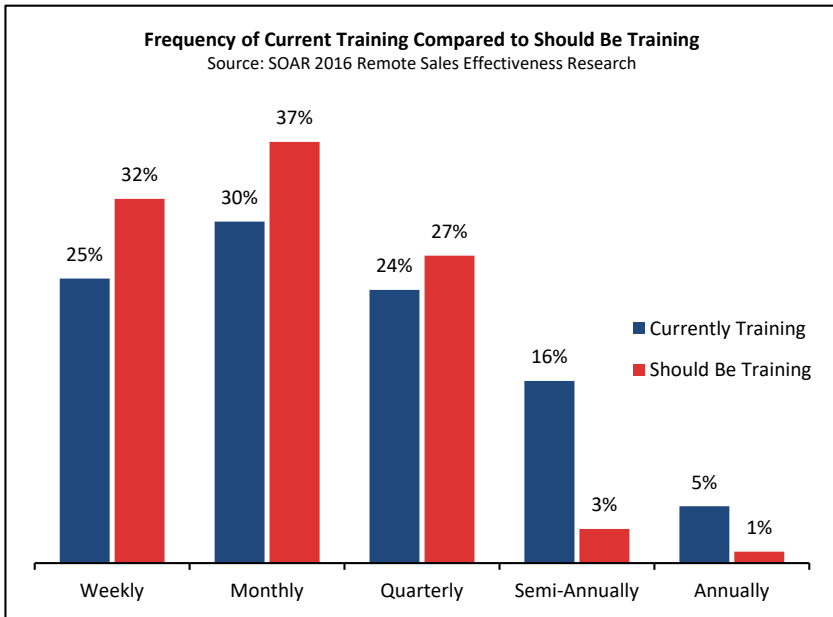


## Top performers dedicate regular time to individual and team sales skill development

- Sales managers that conduct sales skill development training monthly have 16-20% higher overall sales performance when compared to their peers that conduct sales skill development training semi-annually.
- Tailoring the training to the individual based on observations ‘from the field’ also yields an increase in sales performance.
- In addition to increased quota achievement, getting the sales team together, whether in-person or virtually, facilitates the knowledge transfer and engagement which both managers and sales people find so challenging. (see charts on page 4)

## Room for Improvement in Frequency of Training

Managers agree that they should be training more frequently to develop sales skills. Actual training currently occurs less frequently than most managers know it should according to the research.



## Best Practices

### Patrick, Regional Sales Director, Denver

The sales management team has always held a weekly conference call with their sales people. Upon reflection, the consensus was that the entire team “was just going through the motions” and leaving the call with little momentum. Patrick noticed the shift in tone each week when sales people were asked this question – “How many deals did you close last week?”

The sales management team decided to stop asking this question and instead focus the call on knowledge sharing. Topics were selected and the conversations are led by the sales people.

Call topics have provided for valuable conversation. Examples of call topics include:

- Why do our customers choose to buy from us?
- Why is this particular part of the solution important to the customer? Why would this influence the customer?
- What questions lead to a more productive conversation during a first sales call?

Patrick considers these calls more beneficial for him and the team. They also started conducting these calls via webcam so that everyone can see each other.

“It never hurts to see the person you are talking to. Body language doesn’t tell you any less because you’re remote.”

Last year, Patrick and his team achieved 212% of their territory goal. This year, they are continuing to grow. He added two sales people last month and has plans to hire three more in the coming months.



## What are you doing to facilitate knowledge transfer and engage your sales team?

We started this discussion talking about the changing sales environment. More and more sales people are becoming remote and working outside of the physical office. In our survey, over one third of respondents are in a physical office fewer than five days per month. This shift presents challenges for managers, primarily knowledge transfer and engagement. The research suggests three important ways to combat these challenges, lead more effectively, and deliver sales performance.

**Incorporating these three recommendations will result in a more engaged, knowledgeable and effective remote sales force.**

### 1. Manage Engagement as a Process

Treat engagement as a process that incorporates routine communication, goal setting, individual skill development, and team skill development at regular intervals. The high performing managers that contributed to the study track engagement as an internal Key Performance Indicator and reserve time to ensure all the types of engagement are occurring with the frequency required for their teams to thrive.



### 2. Attend Prospect & Client Meetings with Sales People

Grab your briefcase and meet your sales people regularly on the road for prospect and client meetings. Beyond the fact that attending more meetings leads to an increase in sales, it also helps with knowledge transfer and engagement. Seeing your sales people in action will help you tailor your training and coach more effectively by giving more relevant feedback based on observations.



### 3. Conduct Individual & Team Sales Skill Development

Schedule regular coaching sessions, both individually and as a team, for ongoing sales skill development. Our research data shows that increasing the frequency of these sessions has a direct positive effect on sales performance. These sessions also allow teams time to reinforce previous training sessions, share best practices and recreate some of the office touchpoints.



## Acknowledgements

We would like to thank all of the sales professionals who patiently invested the time to provide data related to their remote sales teams. Without their support, the development of the research knowledge base used in the creation of the 2016 Remote Sales Effectiveness Study Summary of Findings would not be possible.

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