

**CHEAT SHEET**

117 Sales Leadership Tips

**Tips, tactics, and strategies to turbocharge
your sales leadership success, straight
from the trenches of growing one of the most
successful SaaS companies in the world.**



1 Success rises and falls on frontline managers

The quality of the manager is the biggest factor in long-term success. A **GREAT** manager up levels her team, replaces bad reps with great ones, and coaches up the rest.

3 Get out into the field with your people. A lot.

Powerful benefits go to sales leaders who spend a lot of time in the field.

But: Play a support role on calls, not a leading role!

5 Manage inputs more than outputs

Things like **rep KPIs** that lead to success, finding new pipeline, and fixing bottlenecks in your sales process.

7 Set standards that define greatness

What's acceptable, what's not, and what you expect. **Set the standard around excellence**, not the minimum expectations.

9 Be the thermostat, not the thermometer

Set the tone. Bring presence. Your people need that. That's leadership.

2 Your job is to get things done through other people

The only way to achieve beyond the limits of your own hands is to leverage the contributions of others. Your reps. Your peers. Your partners. Even your boss.

4 If you don't have a sales process, that's your #1 priority

No sales process, no repeatability. Your reps should be able to write down your sales process in avunanimous agreement. They should all knowvthe stages.

6 Prioritize people over tasks

When you're a sales leader, you prioritize your people over your tasks. **That means filling your time with coaching and helping your reps create their personal development plans.**

8 Your lowest producer is the de factor minimum acceptable standard

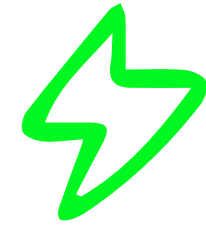
Think of the worst rep on your team right now. By **NOT** addressing that person's performance issues, **you communicate to the rest of your team that their performance is acceptable.**

10 You should probably terminate someone by day 90

During your first ~45-60 days, you're on a mission to identify which person on your team needs to be let go. And then pull the trigger by day 90. It's hard advice, but ignore at your peril.

11 Arm your team with what they need to win

Isn't this product marketing's job? Or sales enablement? Your job is to win with whatever gets results, content included.



13 Become the person at the company who knows the customer best

Hit the road. Get on calls. Talk to customers. Become the person who has spoken to more customers than anyone. This is how you earn the right to be an expert on the company's external environment.

15 Before reviewing a deal, review the total pipeline

Start your deal review sessions with a macro-view of the rep's pipeline. Don't zero in on a single deal (yet). First, understand the health of the rep's quarter by looking at total pipeline.

17 Go deep on just 1-2 deals at a time

Most sales managers try to cover too much ground in pipeline reviews. What a rep learns in one deal review can scale-out to the rest of their deals. Don't go shallow. Go deep.

19 A consistent sales process is the key to great pipeline reviews

How are you supposed to review pipeline, and deals, without a sales process? Without one, you have no idea where you are with a particular deal.

And your pipeline is just a meaningless number. Instead of a number sliced into stages that you can verify.

12 Don't roll anything out unless you're committed to it

And stay the course when you do! Reps revert back to old habits, **VERY** quickly without reinforcement. The **REAL** work begins **AFTER** the rollout. Stay the course.

14 The deal review process is one of your most powerful tools

Your deal review program kills three birds with **one stone**: First, you manage your pipeline. Second, deal reviews are a **GREAT** vehicle to insert coaching into. Third, learnings from great deal reviews "scale" to the rest of a rep's deals.

16 Review deals with the "5 P's" framework

Pain, power, people, process (their buying process), process (your sales process). If you use this consistently, you'll run your team's pipeline like clockwork.

18 Never end a deal review without action items

Spend the last 2-3 minutes of every deal review 1:1 summarizing the action items both you and your rep owns. Send them as a follow-up email to your rep with your email bcc'd as a reminder.

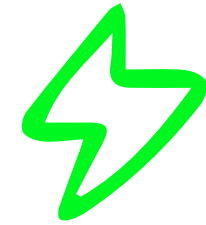
20 The sales process stage will dictate the questions you ask in a deal review

Sales stages lead to the right questions. The right questions lead to the right deal strategy. Make sure your process is defined and build your questions from there.

21

The most common deal strategy mistake is pre-mature prescriptions

Spend most of your time asking questions and brainstorming. Rather than tritely jumping to “here’s what to do...”



23

Don’t “delegate” forecasting to your reps!

Yes, reps should call their own number.

But delegating that to them without review? Big mistake. Question your reps to understand their decision-making process.

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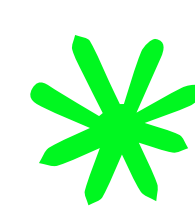
Use a combination of “bottoms up” and “tops down”

Typically, you have revenue operations running the tops-down forecast. And the sales leadership organization calling the bottoms-up. Great forecasting marries the two.

27

Great leadership involves personalizing and treating each rep differently

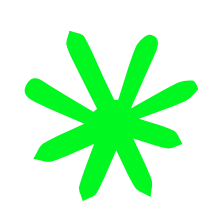
You can’t lead people if you don’t know them really well. A blunt, firm style may work with one person. But may totally backfire with another.



29

Make few promises. Keep them all.

You never know what senior leadership is going to spring on your next! So if you make a bunch of promises to your team, but then your senior leaders make new demands...you literally won’t have time to deliver what you promised to everyone.



22

Great sales leaders take forecasting seriously

Companies live and die on the accuracy of their forecasts. It helps leaders understand how much to spend on marketing, how much to staff up (or heaven forbid, staff down), and the general health of a revenue line.

24

Base deal-by-deal forecast on customer actions

Big forecasting mistake: forecasting a deal because of “boxes we’ve checked” in our sales process. **Instead, focus on the measurable actions customers take.**

26

Hold your reps accountable with a forecast reconciliation process

A forecast reconciliation “pushes” the burden of under-forecasting down to the rep-level so you’re not the bottleneck.

28

Have a career conversation with each new rep

I stole this from Kim Scott in her book Radical Candor. Each time a new rep joins your team, schedule a 60 min meeting with them. Your goal is to get to know them at a **DEEP** level. What makes them tick?

30

As a leader, remember you’re on stage every day

Your people are watching you. Everything you do, say, write, and the way you carry yourself sends signals to your reps. These signals affect their performance.

31

Don't confuse your role. It is to extract performance

Consider the purpose of your organization: It's performance. Get your people to perform to their highest capabilities in service of the company.

33

Realize your people do not do things the way you would

You have to be okay with a) people doing things differently than you would and b) the quality of work being about 80% of what you'd deliver.

35

Double down on strengths. Not weaknesses.

Take their strengths. And make them stronger. Turn your relationship builders into SUPER relationship builders. Turn your challengers into SUPER challengers.

37

Spend MOST of your time with your BEST people

The best sales leaders invest in their best. Spending time with a rep does not mean you're fixing or correcting that person.

Remember your job? Extract performance.

39

Time away leads to decay

This isn't talking about time-off or PTO. You should take that. This is talking about leaving your best reps alone. They need watering. Nurturing. Constant care.

Take too much away - your best reps will decay.

32

Dictate outcomes. Not selling styles

When you standardize on outcomes, you avoid what's counterproductive (and impossible anyway): **Forcing everyone to follow the same path you would to achieve them.**

34

Be able to articulate the strengths of each rep

Great leaders don't generalize their people. They find out what's unique and strong about each rep. And they use that to bring out the best in their people.

36

Managing people by exception, is the only way to manage

What does it mean to "manage by exception?" It means you're managing people as individuals. Which is the only "**right**" way to manage people.

38

Judge your people against excellence, not average performance

Great sales leaders don't use average performance as the measure against which each rep is judged.

They use greatness. Average is irrelevant. That's not where you make the big money.

40

Eliminate talent roadblocks

A big part of your job as a sales leader? Eliminating administrative headaches. But doing so serves a worthy purpose: It frees up your people to use their talents.

41 **Don't assume your best people know their value**

Go back and tell your best reps WHY they are so good. Explain to them the contribution they make to the team. The company. To you. Just simply tell them why they are so valuable. Don't assume they know it.

42 **Balance accountability with teaching**

If your reps KNOW how to do something... your job in that context is to hold them accountable to do it. If they DON'T know how... Then teach them. Once you've taught them? Go back to the beginning of the circle.

43 **Should you become "friends" with your reps?**

There's nothing wrong with becoming friends with your reps. On one condition. You can continue to hold them accountable. And evaluate them on achieving outcomes.

44 **Discover each rep's greatest talent**

A sales rep's source of his or her greatest joy and satisfaction usually indicate their greatest talent.

45 **Be each rep's "PR" scorekeeper**

PR stands for "personal record." Each rep has their own personal records in a sales context: Best month ever, best quarter ever, most pipeline generated in a week, etc. Keep track of these things.

46 **Your people will "starve" if you don't give recognition**

If you give little or no recognition and praise, your reps are left to "survive" on their own emotional reserves. And if they're doing that... what good are you?

47 **Realize hiring is the magic pill (not really, but close)**

If you were mediocre at coaching. Mediocre at pipeline management. Mediocre at operational rigor. But GREAT at hiring... team of total A-Players. You'd still probably be successful.

48 **Create unmistakable clarity in your hiring**

This is by far the most powerful thing you can do to improve your hiring. Get crystal clear on three things:

1. Role outcomes
2. Ideal rep profile
3. Evaluation methods

49 **Define Role Outcomes for each sales role under your purview**

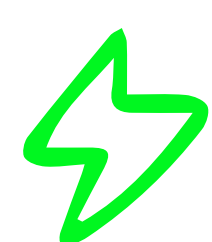
Here's what Role Outcomes are not: job descriptions. Job descriptions are a list of day-to-day activities. It varies based on role, but specificity is key.

50 **Define a (3-part) Ideal Rep Profile**

There are traits. Soft personality traits such as grit and coachability. There are experiences. What kind of sales experiences would a candidate need to be set up for success? And then there are skills. What kind of selling skills do reps need to be successful?

51 Write a definition for each rep profile attribute

Once you've written the attributes of your ideal rep profile, write a definition for each.



Too many sales attributes are nebulous.

53 Design a “predictive” hiring process

You know how you have a repeatable sales process? One with consistent stages and exit criteria? Do the same for your sales hiring process.

55 Ask CONSISTENT interview questions

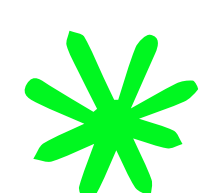
What do I mean by “consistent”? It means you ask the same set of questions to all candidates! Why is that valuable? Two words: **Pattern recognition**.

57 Rate each attribute on a scale of 1 to 5 *

Done interviewing? Here's what to do next. Take your ideal rep profile. The one with your ideal attributes. And now, score your candidate against each attribute on a scale of 1 to 5.

59 Have a colleague run a “targeted interview”

The goal is to drill in like a magnifying glass.



One last look at your candidate with heightened granularity on between 1 and 3 remaining hiring criteria.

52 Define Evaluation Methods for each attribute

How will you consistent assess each trait, skill, and experience in your hiring profile? You must have a consistent evaluation method for each one. If you VARY how you assess each attribute, you'll get noise instead of signal.

54 Ask behavioral interview questions

Behavioral questions get the rep to talk about recent behavior, examples, and evidence of the attribute you're screening for.

56 Ask STRUCTURED interview questions

Asking the same questions in the same order. You do that for the same reason we already talked about: It creates objectivity. Not subjectivity.

58 Run a chronological interview

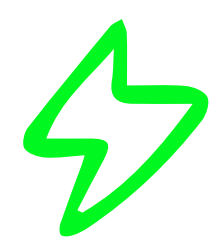
Ask a consistent handful of questions about each of a candidates past roles, starting with the earliest roles and repeating the process as you move towards recent roles.

60 Run a “targeted reference call”

Make sure and follow up with a targeted reference call. One constructed specifically to extract unbiased information. Once you have the reference, use a consistent set of questions.

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Write a “hiring memo” to crystallize your hiring decision

You’re going to STEAL a technique from the venture capital world. Before a VC makes an investment decision, they write a “deal memo” to their colleagues. This is a simple tool that codifies the decision.

73

Get context on previous quota attainment

How did you compare to your peers? What percentile among your peers did you fall each year? What percentage of reps at your past company made quota?

75

Include a writing exercise in your hiring process

Your reps represent your company. A lot of that representation is done through email. Most of it, in fact. You’d be shocked at how often well-spoken people come across as complete morons via the written word.

77

Always be recruiting. Even when you’re not hiring

Always be adding to your hiring bench, even when you’re not hiring. Interview one rep a week, regardless of if you’re hiring or not.

79

One-year stints in enterprise sales is a red flag

It takes about a year to “judge” an enterprise rep. The sales cycles are long. Ramp times are longer. If your candidate had a one-year stint...give ‘em a break. A bunch of them? Red flag.

72

A-Players only

Championship teams have no weak links. What would it cost you to settle for an “okay” rep if it means missing out on the superstar a month later and would have hit 200% of quota for the next three years? Hold out for the best.

74

What are they not getting at their current gig?

Ask candidates what they are looking for in their next career move that they aren’t getting in their current (or previous) job. Hire people who are **moving toward something** rather than moving away from something.

76

Don’t gloss over red flags

The most common form of glossing over a red flag? Staying surface-level with your questions when it comes to the red flag area. Easing up. You’ll be tempted to do this if you have an urgency to fill the headcount.

78

Build a strong brand so the best reps seek you out

Employer branding is not your job. But some of the best sales leaders make it so. All great software engineers will take a call from Google or Apple. Be that place for great salespeople.

80

Realize that coaching is more about self-discovery than instructing

Great coaching is about asking questions, guiding self-discovery, and creating new possibilities with your reps. The most effective coaching focuses helps your people think, analyze, and figure things out for themselves.

81 Separate your coaching sessions from other 1:1s

Separate them from other 1:1s. Do not try to “squeeze them into” your pipeline reviews.

Coaching sessions need their own space:
Context switching kills coaching session success.

83 Define 1-2 focus areas at a time. No more

These should be skill gaps that both you and your rep agree to work on together. Some examples include: negotiation or objection handling. Develop a “skills matrix,” that defines what it takes your reps to be successful.

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87 Spend coaching sessions expanding your reps’ abilities

Spend your session asking your reps questions that expand their thinking around the focus area. Define current state, future state, obstacles, and how to overcome them.

89 One coaching session will not do the trick

A common mistake sales managers make is that one coaching session will “hit home.”

Most new behaviors and skills need heavy reinforcement. Usually, at least four to six times before they stick.

82 Schedule bi-weekly sessions dedicated to coaching with each rep

Is there anything magic about bi-weekly? No. But we’ve tried everything else. Bi-weekly works best.

84 Co-create a coaching plan together

You just spend time defining your focus area. Now... with your rep, brainstorm action items you can both take to help the rep improve in that area. Document them. Assign ownership. And deadlines.

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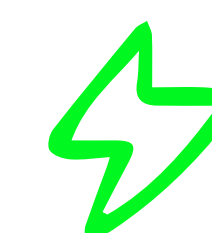
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88 The behaviors you recognize, repeat

You will see the behaviors you recognize repeated more often. Reinforce best practices by recognizing your people when they do them. When you recognize a specific behavior, the person will know what to do next time.

90 Do not split your coaching time across reps evenly

You don’t get paid for splitting your time evenly across your reps. Split your reps into groups based on their desire and ability to change and spend time staggered towards the most coachable folks.



91

People “own” what they create

The best coaching sessions have well-crafted questions that get reps to create (and own) their own solutions. **Empower your reps to self-reflect and arrive at their own insights 75% of the time.** Be prescriptive the other 25% - when they're just not getting it.

93

Spend a lot of time on call planning with your reps

Spend more time planning reps' calls with them. Not only will the call go better as a result of you helping...but you'll find coaching opportunities you never would have seen without doing this.

95

Always start feedback with self-assessment first

It's counterintuitive. But when giving feedback, instead of sharing what a rep did right or wrong, get their assessment first. Sure, give your feedback. But the rule to follow? Only give feedback after self-assessment.

97

Painful failures can create powerful coaching opportunities

Sometimes, you have to let your reps suffer through their own mistakes and the agony of defeat rather than taking over and "rescuing" the sales call. It will provide an opportunity for great coaching.

99

Vary your coaching style between A and B Players

When you're coaching A Players, challenge them. They are usually big thinkers. Push them even further.

Take a different approach with B Players. **Focus on improving their consistency.**

92

Ask Keith Rosen's billion-dollar coaching question

A rep comes to you with a problem and wants a solution. When in doubt, say this: "I'm happy to share my opinion with you. However, you're much closer to this situation than I am, and I trust you and your judgment. So, what's your opinion on how to handle this?"

84

Coach the wins. Not just the losses

Emphasizing wins, and the things that led to them, creates more wins. Focus more on what your reps are doing right than just on what they're doing wrong.

96

Every rep gets coached. Even the best ones

Too many sales leaders position coaching as a remedial approach meant only for poor performers. Position coaching as something you do with everyone to make them even more successful.

98

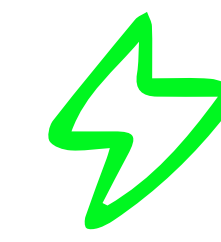
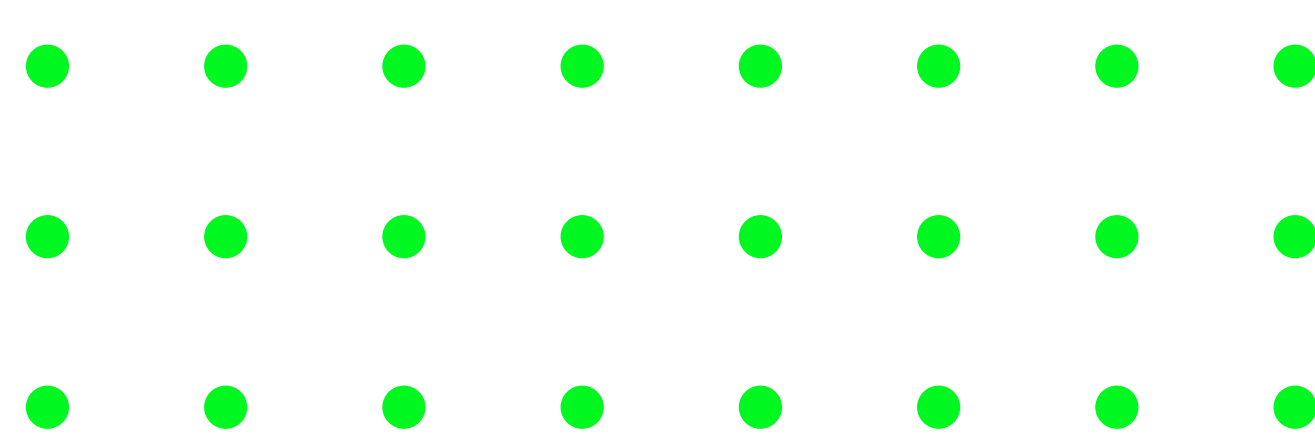
Try to ask 5 questions in a row before giving answers

You might think we're "anti giving answers" to reps. Nope. We're just in favor of trying to get THEM to come up with answers before you finally step in.

100

Use softening statements before giving tough feedback

Allow your reps to emotionally prepare for what you're about to say. Try the phrase, "Can I tell you something that might sting a little but will make you more successful over the long term?"



101 Most reps won't develop themselves

According to Chet Holmes, only 10% of people have a learning mindset. The other 90 percent will only pursue skill development if it's part of a job requirement. So make learning and skill development part of their job requirement.

103 Always expect data errors in quota & comp plan assumptions

Sales ops usually owns that process. And they'll use PLENTY of data to try to set things right.

Your job is to find the error in their data.

105 Be a pessimist when setting revenue targets and an optimist when carrying them out

Simple. Nothing more to be said there.

107 Keep strategic comp plans simple

Can you communicate your comp plan in a single page? That's a good acid test for simplicity. Any complexity should come from tactical comp. If any.

109 Not all sales dollars should be comp'd equally

Don't treat all dollars the same in the comp plan.

Pay more for strategic dollars. Pay less for opportunistic dollars.

102 Don't talk about comp, quota, or account assignments in team mtgs

Save these topics for 1:1s. You'll have to break this rule every now and then. But make it rare.

Talking about these topics in team meetings has a weird effect on morale and rep attitude.

104 Account continuity has a compounding effect

When a company grows, account reassignments naturally happen. Just realize: you're interrupting compound interest of a rep being embedded in an account when you do that. Especially post-sale.

106 There are two types of comp: strategic & tactical

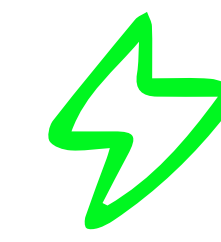
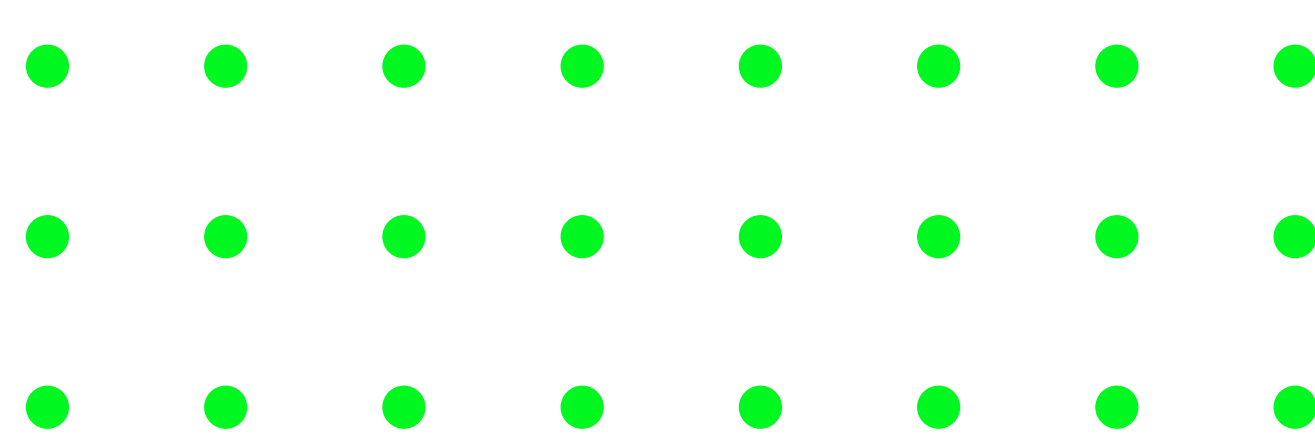
Strategic compensation is annual compensation plans and long-term monetary decision Tactical compensation takes the form of contests, SPIFFs, spot bonuses, etc.

108 Reps will underperform until they have their quotas, comp plans, and accounts

Almost every company does this. They delay getting their quotas, comp plans, and accounts out to the reps until several weeks into the new fiscal year. The sooner these are out to the reps, the sooner they will sell.

110 Rep motivation is dictated by the quality of objectives

Quota plays a huge role in the quality of a rep's life. Set quotas that are challenging yet attainable? Recipe for motivation.



111

Comp plans should be a byproduct of this year's strategy rather than last year's goals

Simple.

112

Comp plans are not a substitute for good management

You can't substitute good coaching, training, accountability, and performance management with comp plans. You can't manage people by spreadsheets and formulas.

113

Your job is to set performance expectations

Across all dimensions of the job. Not just quota. If you don't do this clearly, your reps don't know what they should be doing.

114

Performance management should start EARLY

Imagine your low-performing rep is driving a car. And they're headed full speed toward the edge of a cliff. Your job as a performance manager is to tell them they're headed for a cliff as soon as that's the case.

115

If you don't address a poor performer, YOU ARE the poor performer

Failing to swiftly address weak performance deteriorates the performance of your sales team. You're expected to address those problems.

116

Documenting PIP standards reduces fear

This one is counterintuitive. BUT...The act of doing that actually REDUCES fear on your team over time. Because now people know what to expect.

117

The goal of a PIP is to achieve a positive result

It's not just a formality before you terminate someone. If you're going to do that, just skip the PIP and fire them.

118

Address performance issues swiftly

Here's a rule of thumb: It always took you too long to address a performance issue. If you sense it, act on it. Now.

119

It takes three people for a PIP to turn someone around

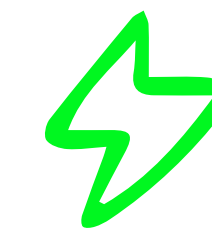
You. The rep. Your boss.

If all three of you are not committed to achieving a positive result, just fire the rep and pay them three months' severance.

120

Allow your reps to co-author their PIP

You have to collaborate on the plan. If you create it all with an iron fist, they won't have ownership. And it will fail.



121

Define clear, written PIP criteria

Make sure **everyone** knows what triggers a PIP. You can bucket these into three categories: performance criteria, process, and post-PIP performance standards.

122

Don't be seduced by potential. Judge on results

Most sales leaders get attached to a rep's "potential." But really, that's only because we're attached to the outcome. If someone is wrong for the job, "potential" won't turn it around. Lots of people have potential. Few people tap into it.

123

Avoid "random acts of execution"

Desperate to make a quick impact, new sales managers jump to random acts of execution. Instead of building a focused plan Build well-defined priorities and a focused plan of attack.

124

Avoid making changes too fast

Balance the amount of change you're introducing. Too many changes and reps resist you, peers resent you, etc. Too little and there may be concerns over lack of progress.

125

Avoid inadvertently undermining your reps

Too many new sales managers take over and dominate their reps sales calls. You becoming domineering instead of an inspiring leader. Know your role of support and stick to it.

126

Avoid trying to impact short-term revenue too fast

An unhealthy desire for delivering quick revenue will drive you into the hole of becoming a super star salesperson instead of a sales leader and sacrifice long term results for short term ones.

127

Communicate with your cross-functional partners

You can't do everything in a silo, you have peers in marketing, enablement and ops, success, and PSO. If you change your strategy, don't forget to communicate those changes (and their impact) to the cross-functional folks who matter.

128

Don't under-communicate with your new boss

Managing up is key here. When you have a new manager, make sure they are fully looped in to your plans so that you don't undermine any progress on their end and so they have the information they need to influence positive change.

