"Tony Robbins has been one of the critical keys to salesforce.com's culture, our leadership in cloud computing, and our growth into a three billion dollar company."

MARC BENIOFF, CHAIRMAN AND CEO SALESFORCE.COM

PATHWAYS TO GROWTH

9 DISCIPLINES TO CREATE SALES BREAKTHROUGHS IN TURBULENT TIMES

TONY ROBBINS   WALTER ROGERS

FOREWORD

THE SYSTEM TAUGHT IN THIS BOOK CAN TRANSFORM THE SALES EFFECTIVENESS OF ANY COMPANY.

I've been around sales almost all my life. When I was growing up, I watched my father build a chain of stores that sold apparel. When I was 15, I started my first business, Liberty Software, with a friend. Our passion was writing computer games, but along the way we also figured out how to sell our products to Atari. Later, I had the good fortune of interning at Apple, one of the most innovative sellers of this age. When I graduated, I followed the urging of my college professors and began my career working in sales for Oracle as a way to gain business experience. Dealing directly with customers, I developed a deep appreciation for the art of discovering their point of view. In many ways, my understanding of business began with sales, and so too does my perspective on it.

While my heart was always to start my own company, I've never wandered far from the business of sales. And that's appropriate. Because the way I see it, every business revolves around sales. There may be seasons when it seems to take a back seat to other things. But if you observe it long enough, things have a way of coming back around to it.

That's one reason I'm excited about the work of Tony Robbins and Walter Rogers at CloudCoaching International. It was experiencing one of Tony's peak performance events more than a decade ago that got me to tap into my driving force and take the actions that led to creating salesforce.com. Tony has been one of the critical keys to salesforce.com's culture, our leadership in cloud computing, and our growth into a three billion dollar company. Tony and Walter's "Coaching in the Cloud" System maximizes your CRM investment by leveraging breakthrough strategies and tools that accelerate the tempo of your customer's Pipeline-to-Purchase cycle. Both men recognize the role sales will play for growing companies in the coming decade. As

they point out, the economy has driven many companies to exhaust techniques for cutting costs. Sooner or later in the quest for increasing margin, you have to turn your attention to raising top line sales. And the system they are introducing in this book is designed to do just that.

I founded salesforce.com because I saw new potential in the intersection of sales and technology. My vision was to take the mission-critical tasks of the sales force and leverage technology to dramatically improve them. Now Tony and Walter have joined forces to help companies leverage the role of the most influential members of the sales force—the sales managers and executives. Between them they've served thousands of companies around the world including many of our most important clients. The work they do is transformative. And as you're about to see, their expertise will provide you with a framework for finding the ideal pattern for maximizing your company's sales as well.

Even in this economy, there are clear *Pathways to Growth*. When you combine the proven disciplines they teach with today's innovative cloud business tools, you can expect nothing less than a breakthrough.

MARC BENIOFF
Chairman and CEO
salesforce.com

In 2012 Forbes named salesforce.com the world's most innovative company… for the second year in a row.

To make a donation, please visit:

www.ilovebenioffkids.org

A contribution of $10 to $100 or more is suggested to support the UCSF Benioff Children's Hospital. UCSF Benioff Children's Hospital is recognized throughout the world as a leader in health care, known for innovation, technology and compassionate care. Its expertise covers virtually all pediatric conditions, including cancer, heart disease, neurological disorders, organ transplants and orthopedics, as well as the care of critically ill newborns. 100% of the contributions collected through the sale of this book will be donated to the UCSF Benioff Children's Hospital.

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"EXCELLENCE IS AN ART WON BY TRAINING AND HABITUATION. WE DO NOT ACT RIGHTLY BECAUSE WE HAVE VIRTUE OR EXCELLENCE, BUT WE RATHER HAVE THOSE BECAUSE WE HAVE ACTED RIGHTLY. WE ARE WHAT WE REPEATEDLY DO. EXCELLENCE, THEN, IS NOT AN ACT BUT A HABIT."

- ARISTOTLE

By Chris Ahearn, Sr. Advisor, TPG Operations

THE LOST ART OF SALES MANAGEMENT

For over 20 years I've worked to transform sales organizations around the world. During that time I've witnessed one pattern that seems to be the common thread in causing more damage to companies than anything else I've ever seen.

1,000 MILES AWAY IN THE CHICAGO CORPORATE OFFICE, THE SVP OF SALES WAS MEETING WITH THE CFO AND SOME CONSULTANTS ...

I witnessed it for the first time on a Monday morning in July of 1996.Two events were unfolding simultaneously that would have a decade-long impact on the effectiveness of front-line sales management in our company and virtually everyone else in the industry. It would be nearly twenty years before companies would realize the impact of the events that took place on that day.

The first event began at 7:30 am at a local sales office. The front line sales manager had his team assembled. The meeting was started by recognizing top performers and pointing out best practices and missed opportunities that were uncovered on the prior week's "ride-alongs." The manager then switched to a discussion about key company updates and news. Then came the flip charts and statistics. What business closed last week? How are we doing against budget/quota and forecast? The manager went around the horn pointing to specific salespeople and making inquiries. What are your top opportunities? What needs to be done to close them? What calls do you have set up and what new prospects will you see? It was the manager as effective sales leader. As the conversation progressed, the manager kept a running total. He tallied the numbers at the end. If they were low, the discussion turned to one action each rep could take to close the gap. If the total was high, the team was challenged to do more. Best practices and market intelligence were discussed. An hour later the meeting ended with everyone on the same page.

Meanwhile the second event was unfolding 1,000 miles away in the Chicago Corporate office. The SVP of Sales was meeting with the CFO and some consultants about the ability to deploy technology and move to hoteling/home offices. The CFO mentioned that since the company went to shared services with HR, finance and other functions,

there was a lot of unoccupied space in the field offices and that the real estate costs were significant. There were demos about automated report distribution, SFA (now known as CRM). There were discussions about how sales teams would meet and there was talk about renting hotel meeting spaces.

The economy was expanding based on the tech boom, and new sales professionals were joining at a time when selling wasn't as difficult. Some reps would later say, "You

THE MODERN SALES MANAGER

HAS NEVER KNOWN THE PATTERNED TRADITION

OF IN-PERSON DISTRICT **SALES MEETINGS** ON MONDAY MORNING,

1-ON-1 LEADER MEETINGS,

SHARED **BEST PRACTICES,**

AND **COMMON GROUND MARKET INTELLIGENCE**

could grow in your sleep." The new technology being created was expected to bring sales productivity.

So, sales offices began to close. Sales reporting began to arrive by mail, rarely on time and rarely accurate. Team meetings gave way to conference calls and the very managers that excelled at hosting live meetings struggled. Salespeople were distracted and disconnected. Best practice sharing screeched to a halt. The new technology wasn't as advertised.

But the economy was still strong and few noticed.

That brings us to today. The modern sales manager has never known the patterned tradition of in-person district sales meetings on Monday morning, 1-on-1 leader meetings, shared best practices, and common ground market intelligence. In short, the modern sales manager has never seen nor followed the pathways to growth that their predecessors blazed so clearly. Many modern sales

managers grew up with no offices, no tangible connection to their teams, and no models to follow. They made their own paths to success. In the mid 2000s, nobody thought much of it. But when the U.S. and world headed into the deepest recession since the 1930s, the missing disciplines of the Monday morning sales leader were exposed.

Now, companies across all industries are recognizing the critical need for more effective front line sales

NOW, COMPANIES ACROSS ALL INDUSTRIES ARE RECOGNIZING THE CRITICAL NEED FOR MORE EFFECTIVE FRONT LINE SALES LEADERS. THEY ARE LOOKING FOR ANSWERS, SOME OF WHICH LEFT THEM TWENTY YEARS AGO.

leaders. They are looking for answers, some of which left them twenty years ago.

With any luck, you are one of those front line sales leaders and you are reading this book right now. Because the pages that follow are filled with strategies and solutions for igniting a new set of sales breakthroughs for your team. The problems we all face today can be solved by recovering those disciplines that once yielded results—disciplines that have always yielded results. As the authors are

about to show you, the wisdom in this book will equip you to restore the patterns that can lead you down the path to immediate and explosive growth, just like they've done for thousands of their clients for more than a decade.

The truth is that despite what you might feel, there's never been a better time to be in sales. The newest cloud technology fulfills the promise made in the 90's when sales offices closed. Better yet it has the ability to not only bring back the best

practices lost but to exponentially improve on them with tools like salesforce.com and Work.com. And now CloudCoaching International can show you how to integrate these groundbreaking tools with proven sales management disciplines and behavioral breakthroughs that will help you build your own winning path to growth.

Prepare to breakthrough!

Chris Ahearn

Sr. Advisor, TPG Operations

NOTES

THE PROVEN PATH TO BREAKTHROUGHS

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"7 OF 8 COMPANIES FAILED TO ACHIEVE PROFITABLE GROWTH, ALTHOUGH MORE THAN 90% HAD DETAILED STRATEGIC PLANS."

- HARVARD BUSINESS SCHOOL (BAIN CONSULTING STUDY)

THE PROVEN PATH TO BREAKTHROUGHS

If you're reading this book, you're obviously a leader who is committed to your company's growth—a challenging task in recent years. Since the economic meltdown of 2008, companies worldwide have had to fundamentally rethink their core strategies for success. The primary focus was how to cut costs—how to become more efficient than ever. And the most successful companies discovered ways to increase their

YOU CAN ONLY CUT SO MUCH.

IT'S TIME TO FIGURE OUT WAYS TO GROW THE TOP LINE.

DISNEY, APPLE, EXXON, MICROSOFT, AND FEDEX WERE LAUNCHED WHEN THE REST OF THE BUSINESS WORLD WAS LICKING ITS WOUNDS.

profitability despite the tightening economy. There's just one problem. You can cut your way to survival—even profitability—but *you can't cut your way to growth.*

After four or five years of increased efficiencies—prudent actions that have triggered what is now called a "jobless recovery"—companies are now faced with the reality that there's little else to cut. To avoid implosion their focus has returned to the core component of any company's health and vitality: *top line growth.*

But the question remains: How do you grow sales and expand that top line amid economic turbulence that is beginning to mirror that of 2008?

The answer is simple, but not obvious to most. Your company must find a way to produce greater effectiveness across the entire sales process. The entire sales system, from the sales leaders to the sales managers to the sales reps, must be maximized. It can be done. And world-class companies are doing it right now.

The best companies have always excelled in the most difficult times. A quick review of the Fortune 500 reveals that more than half were birthed in what we would call an "economic winter"—a recession or a depression. Companies like Disney, Apple, Exxon, Microsoft, and FedEx were launched when the rest of the business world was licking its wounds. This had nothing to do with good fortune. There were specific reasons these companies thrived in an economic winter like the one we now face.

If you can learn as they did, not only to become more efficient but also to maximize your sales in this sort of environment, you will possess the power to dominate in any economy.

Our combined business experience is more than sixty years. But for the last fifteen years, we've been obsessed with finding the answers to making companies more effective in maximizing their sales resources. What we've discovered is a breakthrough that is so simple and yet so powerful it enabled companies like

like Dell, VMware, *USA Today*, and salesforce.com to maximize their revenues. Many sales teams or divisions saw growth of 18-35% in a period of only thirteen weeks. How? By simply recognizing that one of the most underutilized resources in companies today is the effectiveness of their sales process. Growth is not only about how you sell. It is also about the system through which your selling resources are maximized.

Ultimately a system is a pattern, and when a proven pattern is repeated

GROWTH IS NOT ONLY ABOUT HOW YOU SELL.

IT IS ALSO ABOUT THE SYSTEM THROUGH WHICH YOUR SELLING RESOURCES ARE MAXIMIZED.

long enough it becomes a pathway to growth that anyone can follow. Pattern recognition, pattern creation, and pattern utilization are the differentiators between success and failure in business, and in life.

Think about this in the simplest arena—the four seasons. Mankind transformed its well-being when it finally recognized the earth's pattern of seasons. Before that we were given over to wandering through the landscape, looking for food or trying to find something we could hunt. But once we recognized the seasons, we were able to tap into our full capacity. We could farm local land and remain in one place long enough to build communities and then cities and eventually entire civilizations. All because we recognized a critical pattern and were immediately able to eliminate one of the most detrimental mistakes people make in business and life: *doing the right things at the wrong time*.

If you fail to recognize the fundamental or most critical patterns to your life and business, then you are destined to make this mistake. You are likely to wander the landscape looking for food or plant in the winter and then wonder why, after all your hard work, you're not seeing the fruit of your labor. A more recent example of this mistake has played out painfully for those who bought personal homes five or six years ago. For nearly 100 years in American culture, buying your own home has been *the right thing to do* as soon as you had or could borrow the money. It was an unquestioned move. But if you bought

in 2006 or 2007, you bought at the wrong time. Today, the value of your home is down somewhere between 30- and 70-percent. Right thing; wrong time. Devastating results.

On the other hand, when you recognize key patterns—when you understand the right things to do and apply them at the right times—you can quickly forge a pathway to growth in any context. The companies with whom we've worked have ignited growth in this long economic winter. We've had the privilege to collaborate

DOING THE RIGHT THING AT THE WRONG TIME ALWAYS EQUALS FAILURE.

and implement our systems for maximizing sales with explosive growth companies; companies like VMware, who grew from $500 million in revenue to $1.5 billion in North America alone. Our "Coaching in the

Cloud" System has been utilized there to help maximize growth. They are now on a path to $6 billion.

Imagine you are in an aging industry like the newspaper business. Your

sales teams are used to receiving phone calls for ads when suddenly your phones go dead. That's exactly what happened at *USA Today*. Our team was brought in to help create a cultural change. In less than 16 weeks we helped them create $36 million in new pipeline blazing a new path to growth.

There's no doubt that cutting costs is tough. Great companies involve not only their CFO but all employees in the process. But growing revenue takes creativity,

stimulation and, ultimately, the right path. Yes, we've seen a sea-change in how things are done. The sales process that the virtual world promised to make easier has made growth even more difficult in this lean winter season. But there is a remedy that has been proven time and again in the halls of the Fortune 1000 clients we serve.

And yes, if you find the way to win in winter as they are now doing, you'll have the opportunity to dominate for decades to come.

In the next several pages we are going to introduce you to the same process by which you can uncover your company's own *Pathway to Growth*. We have been using salesforce.com to help our clients accelerate growth for more than a decade. But now, with their additional release of Work.com we've found ways to dramatically improve the alignment, engagement, and effectiveness of executing growth strategies. In fact, we have had the privilege to help pilot, deploy and launch Work.com and we are

WHEN YOU RECOGNIZE KEY PATTERNS YOU CAN QUICKLY FORGE A PATHWAY TO GROWTH IN ANY CONTEXT.

excited for you to experience it at its Dreamforce debut.

Think of the pages to follow, not as a book, but as a workbook… As a guide to stimulate the types of questions that will lead you to answers for transforming your sales culture and growing the top line in these turbulent economic times. We hope it becomes a trustworthy tool as you continue to hunt for new paths of continued growth. We are only pre-releasing this content here because we know it can serve as a game-changer for salesforce.com clients.

Marc Benioff has been a dear friend since the first days of his great company, and this book is our gift to you, his colleagues, partners and friends, with the goal that it will both inspire you to take new control of your business, and illuminate your ever expanding path to success now and for many years to come.

We hope you find great value in this workbook. If you do, any contribution—from $10 to $100 or more—to the UCSF Benioff Children's Hospital would be deeply appreciated. Thank you in advance for considering being our partner in touching children's lives. The website is below and the donation information is on the inside cover. We hope that this will be only the beginning of your uncovering many new pathways to growth.

To donate, visit:

www.ilovebenioffkids.org

NOW, LET THE JOURNEY BEGIN….

CASE STUDY

VMWARE

THE CHALLENGE

VMware is the leader in virtualization and cloud infrastructure solutions that enable businesses to thrive in the Cloud Era. According to Mike Clayville, in the midst of a turbulent economy, the company focused on behavior as a factor to help raise top-line revenues. Using these disciplines, VMware saw dramatic results in a short period of time, helping them capture enormous market share.

THE SOLUTION

1 **As a Vice President at VMware, Mike Clayville implemented these practices to create alignment and raise performance.**

2 **VMware North America went from about $500M to $1.5Billion using the same sales people. Only their process changed.**

3 **VMware now generates almost $5 Billion in annual sales.**

CASE STUDY

USA TODAY

THE CHALLENGE

USA TODAY, a subsidiary of Gannett is the nation's number one newspaper in print with an average circulation of 1.8 million. The publisher faced the same challenges that all media organizations face today: how to continue to drive revenue and grow business in a highly competitive and rapidly evolving market. They applied these disciplines to leverage sales manager leadership for behavior change throughout their sales organization.

THE SOLUTION

1 — Over 50% of reps that participated closed business inside the initial 12 week period.

2 — After 18 weeks, USA TODAY saw over 36$M in pipeline and $3.4M in incremental revenue.

3 — Six USA Today sales teams took part during a multi-week engagement.

CASE STUDY

$4B DISTRIBUTION COMPANY IN B2B SALES

THE CHALLENGE

This company is a distribution partner for producers and customers for chemicals, plastics, composites and environmental services. With operations across North America, Europe and Asia, they sought ways to expand top-line revenue globally. The disciplines were implemented largely during best-practices sharing and had immediate, stunning results.

THE SOLUTION

In the initial ten-week period,

1. **Open Opportunities were up 115%.**

2. **Wins were up 104%.**

3. **Time to close improved by 12%.**

4. **Volume was up 10%.**

5. **Revenue was up 25%.**

6. **All districts beat their base line and were ahead in metrics vs the control groups by as much as 18%.**

NOTES

TECHNOLOGY TO THE RESCUE

———

"THE OLD WAYS OF ON-BOARDING, TRAINING, AND COACHING SALES TEAMS AREN'T WORKING FOR A WORKFORCE WHOSE EXPECTATIONS ARE RAPIDLY EVOLVING. SOCIAL, MOBILE, AND REAL-TIME ARE THE TABLE STAKES FOR EFFECTIVE PROGRAMS TO DRIVE CHANGE, LEARNING, AND PRODUCTIVITY."

- WOODSON MARTIN SVP PRODUCTS, SALESFORCE.COM

TECHNOLOGY TO THE RESCUE

Today's sales leaders are too often left to ad lib their way to growth. And while hundreds of books, workshops, and training programs created in the last decade might offer hope, they often create more breakdown than breakthrough. Here's why:

When a company has more than one sales team, the managers might share the same philosophy of growth but they employ their systems in different ways and with different tools. As a result, they use a different language from one team to the next. And they emphasize different metrics. Within a single company, you're likely to find sales reps from one region who do not comprehend the system of a sales manager from the next region over. The ongoing dissonance swells into a chaotic culture that makes communication, collaboration, and increased effectiveness far bigger challenges than they should be.

Sales executives spend more time deciphering the chaos than inspiring their managers. Managers spend more time tinkering with their systems than empowering the individuals on their teams. And upwardly mobile reps who are given larger territories spend more time

CLOUD-BASED TECHNOLOGY IS SOLVING THE PROBLEM: ONE COMPANY, ONE SALES TEAM, AND ONE SALES LEADER AT A TIME.

learning new languages than selling more effectively.

Fortunately, there's a very bright side to the current situation. New technology enables clarity and synchronization on a speed and scale unimaginable before. And it is transforming the sales teams of the companies we work with.

Before the advent of cloud-based technologies like those provided by salesforce.com and its new service, Work.com, the dispersed configuration of teams simply did not reinforce the behavior patterns—the disciplines—that once powered growth. The chaos not only failed to promote a common vocabulary and the sharing of ideas; it also failed to promote a unified system within which everyone could execute effectively.

But cloud-based technology is solving the problem: one company, one sales team, and one sales leader at a time. In short, these technologies now enable companies

to restore top-line alignment around key organizational goals, and then break those goals down into the supporting behaviors that make it all happen week in and week out.

When teams experience consistent growth, it's because they have a clear, companywide system in place and they have aligned themselves around it. They pursue the same metrics. They emphasize the same objectives. And most importantly, they practice the same disciplines that create a pattern that drives results.

Our role in this realignment process is to teach you the proven system—the proven pathway to growth—that has produced sales breakthroughs in every client with whom we've worked.

As you establish your pathway, you will begin to maximize all your sales resources to achieve significant geometric top line growth.

Many companies have lost years to ineffective efforts at adapting to a changing workplace and a

turbulent economy. And yet many never lost hope. As TPG's sales expert Chris Ahearn noted, cloud-based technologies are now here to fulfill the promise of hope they've been waiting for. And best of all, they have the potential not only to restore the disciplines we've lost, but to improve them exponentially.

PATHWAYS
TO GROWTH

———

"IF YOU WANT CONSISTENT RESULTS, YOU MUST CREATE CONSISTENT BEHAVIOR."

- MIKE CLAYVILLE, VICE PRESIDENT, VMWARE

PATHWAYS TO GROWTH

Every great company has transitioned from a primary focus on cutting costs to a hyper-vigilance on creating top-line growth. Increasing the effectiveness of all sales assets—from the sales process to the entire sales management team—is today's true pathway to growth. The key leverage point for that critical endeavor is the sales manager.

Focus the sales manager's behavior in the right ways and you can immediately implement a system that revolutionizes entire teams. One effective manager can impact ten reps at a time—or more—leading them to grow revenue exponentially. The billion-dollar question is: How?

10:1
LEVERAGE

The number of books on sales management has tripled since 2000. Last year, there were more than 4.8 million Google searches for "sales management"—a figure surpassed only by the number of explanations that were cobbled together by bloggers and pundits searching for ways to deal with an every-tightening economy. More and more, companies around the world are acknowledging they have fundamental gaps in how sales managers help teams achieve high degrees of sales performance.

But most are still struggling with closing these gaps.

A recent research study reveals that a general state of role confusion is handicapping sales teams everywhere. According to the study, sales managers today believe their effectiveness hinges on the traits they model by example for the rest of the team—competencies like communication, organization, confidence, and time management skills. These are essentially the same strengths that made them

4.8 MILLION
GOOGLE SEARCHES FOR
"SALES MANAGEMENT"

stellar performers before they were promoted to sales management. Meanwhile not a single sales rep in the study identified any of the same factors when describing the ideal manager. A little known fact is that 70% of the time, when a representative leaves a company, it is because he or she has a poor relationship with the sales manager.

What do the representatives say they need? Someone who understands their individual needs and can specifically help them establish the underlying behaviors necessary to meet and surpass their quotas. Someone who can extract and share the *current* best practices of the team so that *all* can benefit from them. They are looking for predictable, reliable, and proven in-the-field coaching to help them better identify and solve client needs. In essence, they are looking for sales strategy, leadership, and support.

In short, the study confirms we have a generation of sales managers who think their primary function is to teach reps how they used to knock it out of the park when they were on the front lines—and, in many cases, even close deals for them. Yet, even the greenest reps can see the need for something more.

The performance of your reps ultimately depends on the manager's ability to align and coach the team on the behaviors necessary for growth. Poor management in this context engenders poor performance. Guaranteed.

WHAT
MANAGERS
THINK
REPS
WANT:

Confidence

Organization

A
MANAGER
WHO
MODELS:

Time Management

Communication

WHAT
REPS
REALLY
WANT:

Strategy

Structure

Coaching

A
MANAGER
WHO
GIVES:

Feedback

Engagement

Leadership
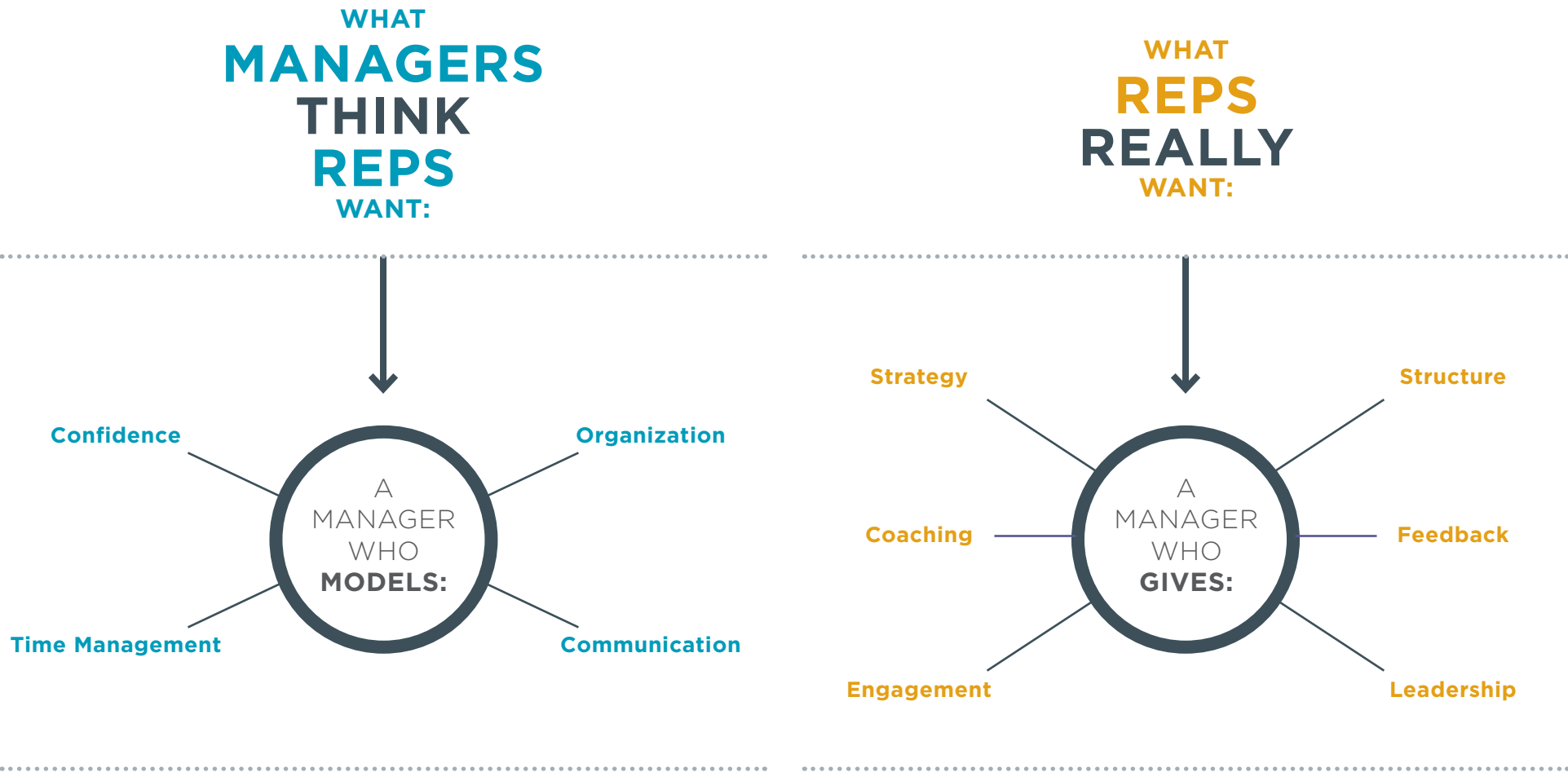
Studies show that fewer than 55% of reps make quota. 65% of sales professionals stop at the second "no." According to a Harvard Business School study, seven out of eight companies fail to achieve profitable growth, although more than 90-percent have detailed strategic plans.

There's no doubt selling is hard work. And replacing a good sales rep is extremely expensive. The average cost of losing a single core sales representative today

70%
OF THE TIME,
WHEN A REPRESENTATIVE LEAVES A COMPANY,

IT IS BECAUSE THEY HAVE A
POOR
RELATIONSHIP
WITH THEIR SALES MANAGER.

is $1 million in lost opportunity, productivity, and replacement expenses. On-boarding then takes an average of 6-12 months to restore a rep to full productivity.

It's seductive to think that there are shortcuts. It's enticing to believe that charisma, confidence, and resourcefulness can form the foundation of a stellar sales career. But as you're about to see, top-line growth is not the result of motivation and moxie alone. Increasing revenue is far more often

the by-product of discovering, creating, and then leveraging the natural pattern that governs your sales team's behavior.

In the world of behavioral science, patterns are everything. It's easier to perform ten tasks when they are habit than it is to perform one task when it's not. Any new task takes more energy than a habitual one; and that energy has to come from somewhere. BJ Fogg, founder of the Persuasive Technology Lab at Stanford University, explains that

THE AVERAGE COST
OF LOSING A SINGLE CORE SALES REP TODAY IS
$ $1 MILLION
IN LOST OPPORTUNITY, PRODUCTIVITY, AND REPLACEMENT EXPENSES.
ON-BOARDING THEN TAKES AN AVERAGE OF 6-12 MONTHS TO RESTORE A REP TO FULL PRODUCTIVITY.

YOU NEED 3 THINGS TO EFFECT A CHANGE:

1 ⟩ **MOTIVATION**

2 ⟩ **ABILITY**

3 ⟩ **TRIGGER**

FOGG BEHAVIOR MODEL

High Motivation

MOTIVATION

TRIGGERS SUCCEED HERE

TRIGGERS FAIL HERE

Low Motivation

Activation Threshold

© 2007 BJ Fogg

Hard to Do   **ABILITY**   Easy to Do
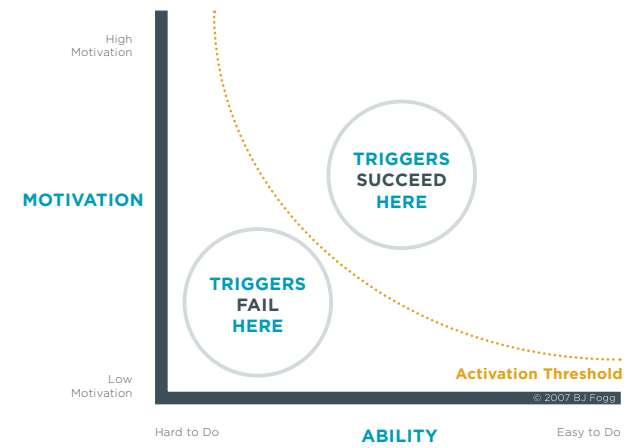
At **Stanford University**, **BJ Fogg**, founder of the **Persuasive Technology Lab**, explains that three elements must converge at the same moment for a behavior to occur: motivation, ability, and a trigger.

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three elements must converge at the same moment for a behavior to occur: motivation, ability, and a trigger.

In the past, sales reps were trained in an environment that provided all three components. The system itself provided all the energy needed to establish habitual patterns in the new sellers. The moment they showed up to work, reps were taken down a proven pathway that surrounded them with motivation, equipped them with ability, and

triggered them to action. Over time, this path became well-worn and easily recognizable. Repeated daily, it all but ensured growth because it regimented the disciplines that drive results.

That same pathway can be created today. In fact, it has to be if you intend to see real growth in this economy. What are those disciplines that create today's pathway to growth?

There are 9 essential disciplines that form the framework initiated

by great sales leaders, and subsequently applied from top to bottom in the sales process. Today's technology can finally provide not just better access to information and collaboration, but the triggers needed to ensure high-performance behaviors occur repeatedly. Not every discipline is for every company. But your pathway to growth is within the list we are about to share.

Every company will create their own formula and use the disciplines that

IN THE MARKET TODAY:

55%

LESS THAN 55% OF REPS MAKE QUOTA

65%

65% OF SALES PROFESSIONALS STOP AT THE SECOND "NO."

7 OF 8

7 OF 8 COMPANIES FAIL TO ACHIEVE PROFITABLE GROWTH, ALTHOUGH MORE THAN 90% HAVE DETAILED STRATEGIC PLANS.*

95%

95% OF EMPLOYEES DO NOT UNDERSTAND THEIR COMPANY'S STRATEGY.**

* Harvard Business School
(Bain Consulting Study)

** Harvard Business School
(Office of Strategy Management)

make the most sense for the type of business they are in and for the markets they serve. This workbook will help you identify and create your own winning formula, enable it with technology, and then deploy it to trigger behaviors that make it all easy, repeatable, measurable, and self-correcting.

Let's now get started with the 9 disciplines that will create your pathway to growth…

THE 9 DISCIPLINES

—

"SUCCESS IS PROCESSIONAL. IT RESULTS FROM A SERIES OF SMALL DISCIPLINES."

- TONY ROBBINS

THE 9 DISCIPLINES

TEAM ACTIVITIES

1. PIPELINE UPDATE MEETING
2. MASTER SALES TEAM MEETING
3. LEARNING HUDDLES
4. DAILY RESULTS CALL

INDIVIDUAL ACTIVITIES

5. FORECAST 1:1 MEETING
6. PIPELINE 1:1 MEETING
7. RIDE ALONG / CALL ALONG
8. MASTER 1:1 SALES MEETING

MANAGING UP

9. EXECUTIVE ROLL-UP MEETING

1 PIPELINE UPDATE MEETING

2 MASTER SALES TEAM MEETING

3 LEARNING HUDDLES

4 DAILY RESULTS CALL

5 FORECAST 1:1 MEETING

6 PIPELINE 1:1 MEETING

7 RIDE ALONG CALL ALONG

8 MASTER 1:1 SALES MEETING

9 EXECUTIVE ROLL-UP MEETING

THE 9 DISCIPLINES

The sales leaders of today have another unique challenge that outstrips anything their predecessors ever faced. What is it? Technology that is relentless and continuously disruptive. On a weekly basis, the average sales leader receives more than 500 emails, sits in an average of 14 meetings, receives over 200 inbound phone calls, and is out of the office 65-percent of the time. That's not even considering the impact of text messaging and social media.

The truth is that most people are drowning in information and yet starving for wisdom. The key question becomes: How do you cut through the waste and utilize your time to most effectively hit the core objective—continuously growing revenue?

The most effective way to eliminate the constant barrage of static and noise interrupting your day is to employ short, focused meetings where you can resolve issues and establish solutions immediately instead of belaboring them for hours over email.

What are we saying? More meetings? No! Fewer meetings. Clearer objectives with specific

timelines. Meetings that have true discipline and produce real and measureable results. Meetings that only move you toward your core objectives. Not meandering conversations that suck your energy and time.

All 9 disciplines are designed to lift you from the ocean of information and help you tap into your wisdom as you focus on the core behaviors that will consistently guide you and your team to maximize sales.

The following is a specific sequence and a process of high-impact meetings with specific goals and objectives that help eliminate the daily churn of reacting to emails, reacting to problems, creating confusion, and wasting time.

DISCIPLINE 1

PIPELINE UPDATE MEETING
MONTHLY TEAM ACTIVITY

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Pipeline Update Meeting   Leader Application   Notes

1

DISCIPLINE 1

PIPELINE UPDATE MEETING

MONTHLY TEAM ACTIVITY

PURPOSE ENSURE PIPELINE ACCURACY AND DETERMINE PRELIMINARY "COMMIT" FOR THE PERIOD.

WHAT IT IS

Like a "spring cleaning," Pipeline Update Meeting is a mandatory 60-minute team working session held each month for all sales reps. The purpose is to hold a team-wide event that ensures everyone begins the month with accurate pipeline information.

DISCIPLINES | Discipline 1　Discipline 2　Discipline 3　Discipline 4　Discipline 5　Discipline 6　Discipline 7　Discipline 8　Discipline 9

Pipeline Update Meeting　　Leader Application　　Notes

HOW TO DO IT

The Pipeline Update Meeting should be held within the first three days of the month, and can be conducted virtually or in-person. Pipeline data must be accurate in order for the manager to coach reps to raise performance. Without valid data, the sales manager is flying blind. Information that is obsolete, incomplete, or inaccurate can cause ripple effects that undermine the team's operations.

Gather reps and open the meeting. Instruct them to update Opportunity Stages, Values, Close Dates, Next Action, and "Commits." All updates should be entered in the organization's CRM system. This is not a coaching session. And reps can dismiss themselves after announcing their pipeline to quota multiple to the team for both in-period and out-of-period.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Pipeline Update Meeting   Leader Application   Notes

60 MINUTE MEETING AGENDA

60   55   50   45   40   35   30   25   20   15   10   5
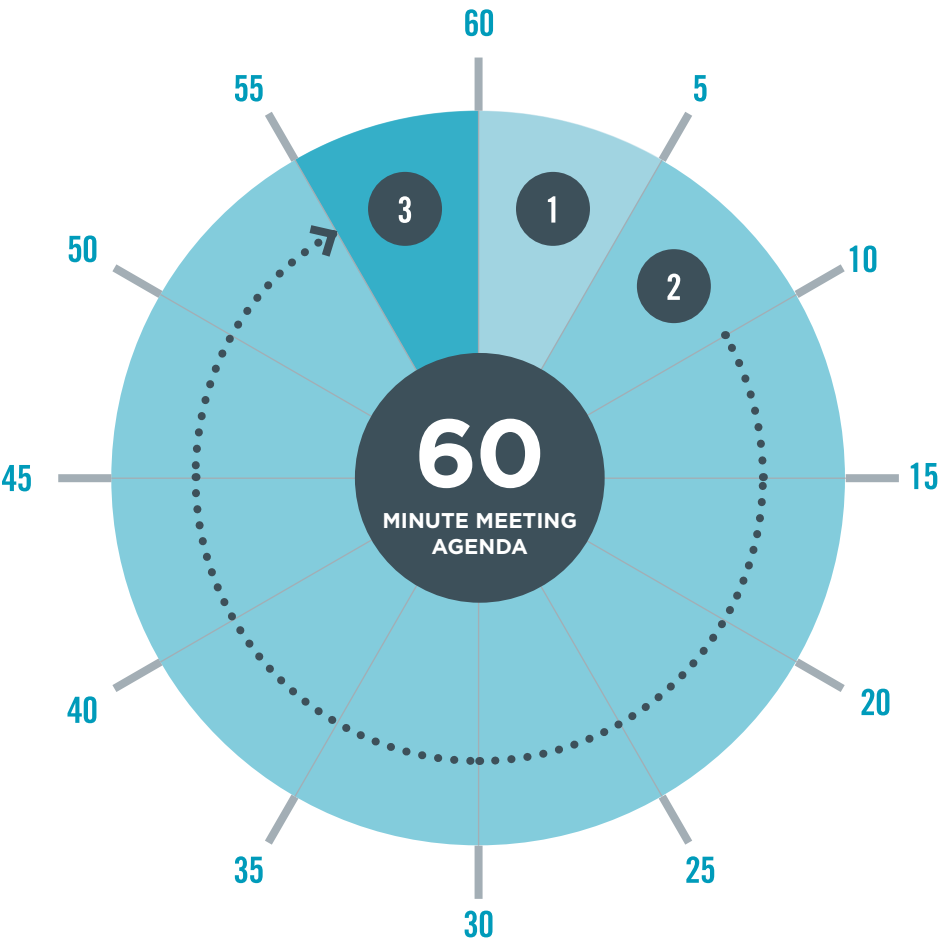
1 — 5 minutes

MANAGER INTRO

Set the stage with a simple purpose statement. A rocket heading to the moon, if off by one degree, will miss it by a thousand miles.
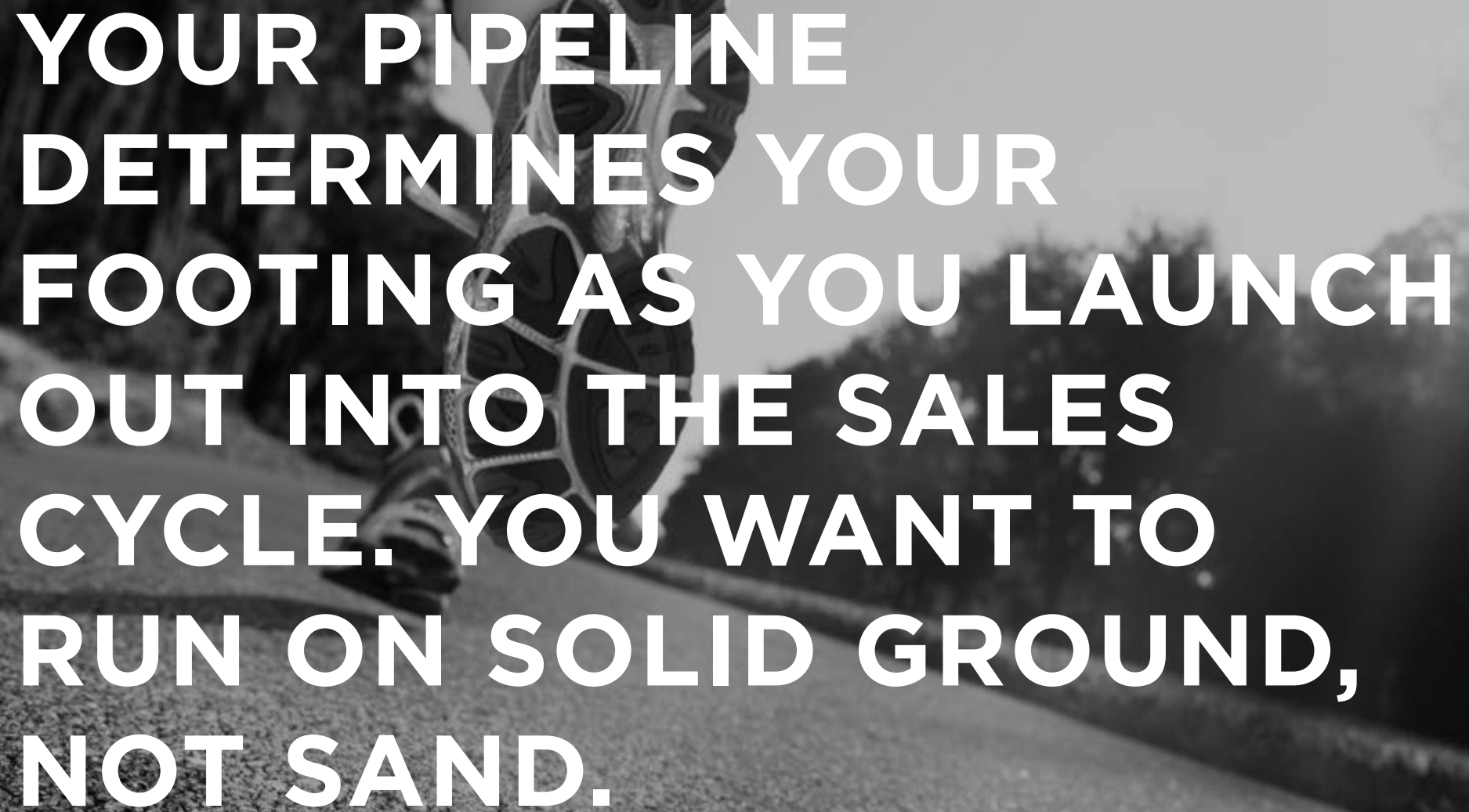
2 — 50 minutes

SALES REPS UPDATE

PIPELINE INFORMATION

Sustainable change almost always involves a change in social networks. When the team works together, this behavior is reinforced.

3 — 5 minutes

MANAGER CLOSE

Select a volunteer to share how this effort will improve focus throughout the coming sales cycle.

YOUR PIPELINE DETERMINES YOUR FOOTING AS YOU LAUNCH OUT INTO THE SALES CYCLE. YOU WANT TO RUN ON SOLID GROUND, NOT SAND.

DISCIPLINES | Discipline 1 Discipline 2 Discipline 3 Discipline 4 Discipline 5 Discipline 6 Discipline 7 Discipline 8 Discipline 9

Pipeline Update Meeting   Leader Application   Notes

MANAGING THE SALES MANAGERS:
The sales leader plays a key role too. These questions create a framework for the leader to follow.

LEADER APPLICATION
THE SALES LEADER'S ROLE:

During Pipeline Update Meeting week, Sales Leaders should

ask Sales Managers:

1 **Which opportunities are there with overdue dates or no activity for more than X days?**

2 **Which opportunities have "pushed" more than three times and why?**

3 **Which Sales Makers have pipeline less than X of quota?**

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Pipeline Update Meeting   Leader Application   Notes

NOTES

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Pipeline Update Meeting   Leader Application   Notes

NOTES

DISCIPLINE 2

MASTER SALES TEAM MEETING
TEAM MEETING DURING WEEK 1 OF THE BUSINESS CYCLE

DISCIPLINES | Discipline 1 | **Discipline 2** | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | Discipline 9

Master Sales Team Meeting   Leader Application   Notes

2

DISCIPLINE 2

MASTER SALES TEAM MEETING

TEAM MEETING DURING WEEK 1 OF THE BUSINESS CYCLE

PURPOSE   TEAM GOAL REVIEW AND ALIGNMENT.

WHAT IT IS

Master Sales Team Meeting is a 60 to 90-minute team meeting designed for action-planning, creating alignment, and discussing performance. More than just a forum for calling out a number, this meeting adds value by debriefing successes and failures, reviewing the state of the territory, and inspiring both cooperation and competition.

DISCIPLINES | Discipline 1 **Discipline 2** Discipline 3 Discipline 4 Discipline 5 Discipline 6 Discipline 7 Discipline 8 Discipline 9

Master Sales Team Meeting   Leader Application   Notes

HOW TO DO IT

The Master Sales Team Meeting is conducted during the first week of the business cycle. This may mean monthly or quarterly. Facilitated by the manager, reps begin by holding detailed discussions around their Key Performance Indicators. Individual performances are praised in this open forum, and others are encouraged. Key opportunities are highlighted, results are compared between team members, and goals are set and reinforced. This environment yields tremendous leadership moments and is a natural venue for best practices. Once reps experience the value of these meetings, they often consider them among the most important activities.

NOBODY IMPROVES JUST BY CALLING OUT A NUMBER. WITHIN THE ENVIRONMENT OF THE SALES TEAM, CONVERSATION IS THE CURRENCY OF GROWTH.

DISCIPLINES | Discipline 1   **Discipline 2**   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Master Sales Team Meeting   Leader Application   Notes

90 MINUTE MEETING AGENDA
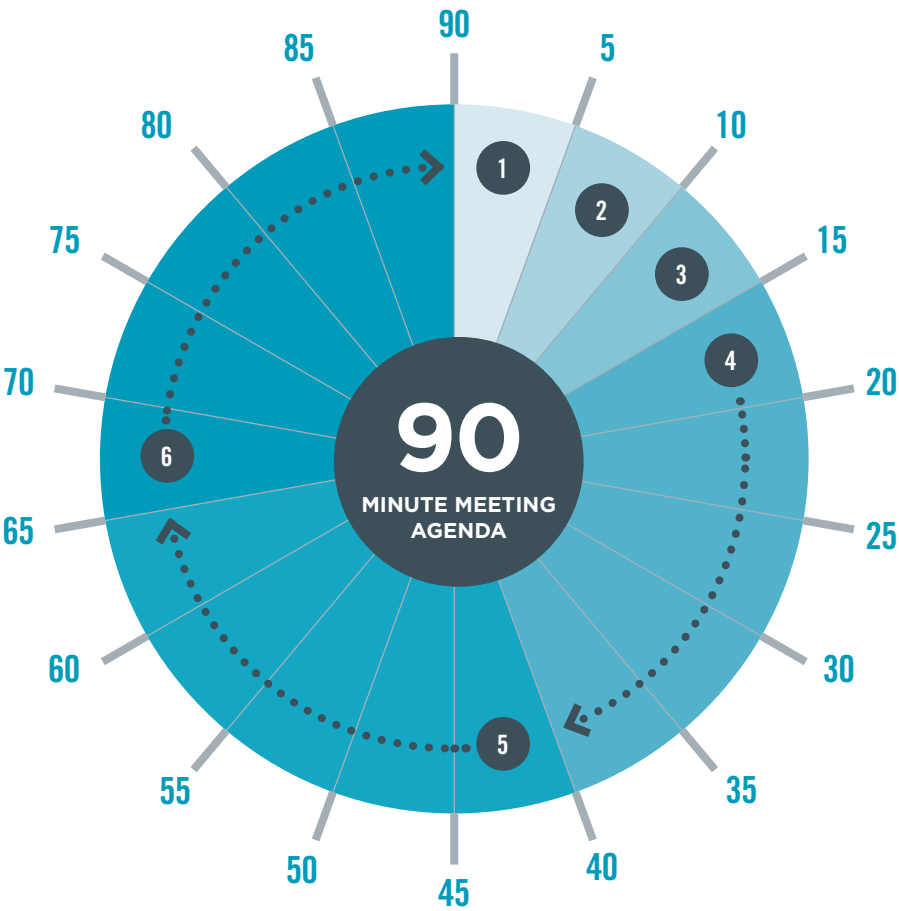
1 — 5 minutes

METRICS REVIEW

Set the tone. Master Sales Team Meeting is a time to inspire the team and instill the concept of continuous improvement through behavior change.

2 — 5 minutes

OPEN OPPORTUNITIES LEADER BOARD

A competitive spirit - when handled positively - is a great source of motivation. The key word is "inclusion." Competition that alienates is divisive. Inclusive competition motivates.

3 — 5 minutes

REP "WIN" LEADER BOARD

Consider inviting reps to share details of their wins. This cultivates a spirit of conversation and sharing best practices.

DISCIPLINES | Discipline 1 | **Discipline 2** | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | Discipline 9

Master Sales Team Meeting   Leader Application   Notes
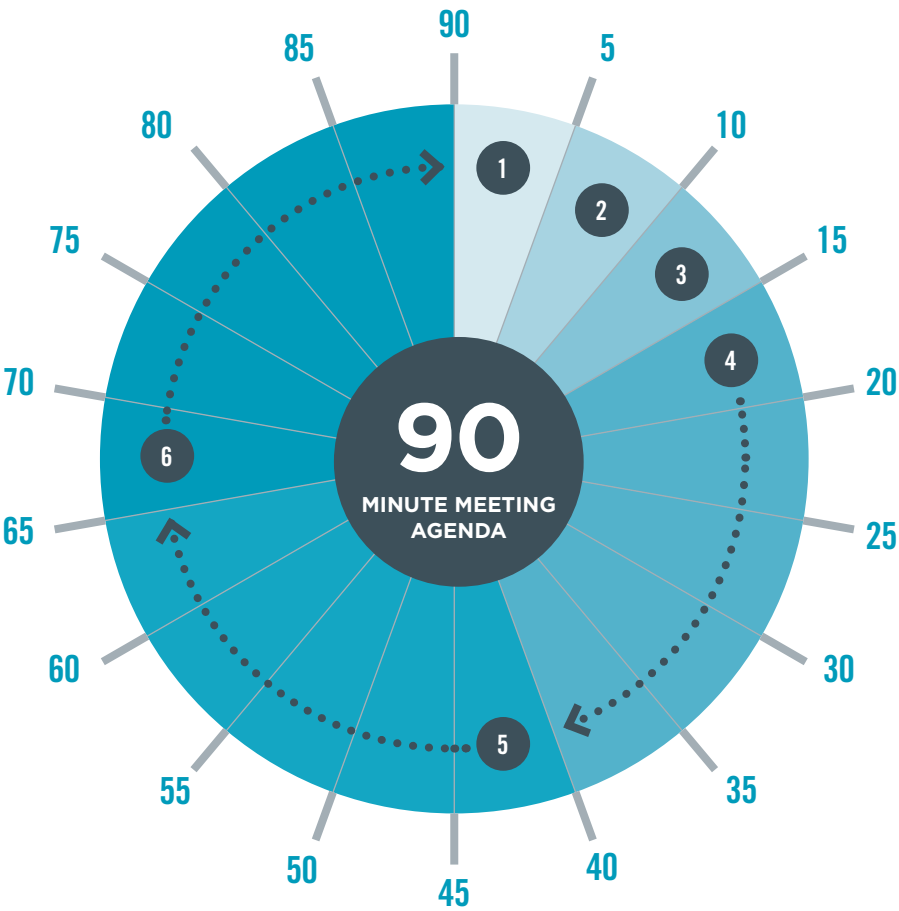
4   25 minutes

TOP 5 OPPORTUNITIES CURRENT PERIOD

Many people learn and process by talking out loud. When reps talk about their current opportunities, they may find themselves discovering strategies for advancing the process.

5   25 minutes

TOP 5 OPPORTUNITIES NEXT PERIOD

As reps talk through their opportunities, it creates a repository of ideas that can be shared across the team.

6   25 minutes

HIGH IMPACT TEAM GOALS

Continuous improvement begins with a mindset. Spend time talking about team goals. This routine practice helps to build your high-performance culture.

DISCIPLINES | Discipline 1 | **Discipline 2** | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | Discipline 9

Master Sales Team Meeting   Leader Application   Notes

1   METRICS REVIEW

TIME TO COMPLETE ▶ **5 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

PTD % QUOTA

IN-PERIOD WINS

IN-PERIOD PIPELINE

IN-PERIOD GAP BASED ON X RATIO

OUT-PERIOD PIPELINE

OUT-PERIOD GAP BASED ON X RATIO

POTENTIAL UPSIDE FROM FUTURE PERIODS

DISCIPLINES | Discipline 1   **Discipline 2**   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Master Sales Team Meeting   Leader Application   Notes

2 OPEN OPPORTUNITIES LEADER BOARD

TIME TO COMPLETE | **5 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

REP NAME	IN-PERIOD VALUE/CHANGE	REP NAME	OUT-PERIOD VALUE/CHANGE
1		1	
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
8		8	
9		9	
10		10	

DISCIPLINES | Discipline 1   **Discipline 2**   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Master Sales Team Meeting   Leader Application   Notes

3   REP "WIN" LEADER BOARD

TIME TO COMPLETE ▶ **5 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

REP NAME	% OF QUOTA & CHANGE	REP NAME	SPECIAL CONTESTS
1		1	
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
8		8	
9		9	
10		10	

DISCIPLINES   Discipline 1   **Discipline 2**   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Master Sales Team Meeting   Leader Application   Notes

4   TOP 5 OPPORTUNITIES CURRENT PERIOD

TIME TO COMPLETE ▶ **25 MINUTES**   **CURRENT PERIOD**   Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

OPPORTUNITY	ACCOUNT	REP	STAGE	NEXT STEP	AMOUNT	CLOSE DATE	$ CHANGE	DATE CHANGE
1								
2								
3								
4								
5								

DISCIPLINES | Discipline 1   **Discipline 2**   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Master Sales Team Meeting   Leader Application   Notes

5   TOP 5 OPPORTUNITIES NEXT PERIOD

TIME TO COMPLETE   **25 MINUTES**   **NEXT PERIOD**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

OPPORTUNITY	ACCOUNT	REP	STAGE	NEXT STEP	AMOUNT	CLOSE DATE	$ CHANGE	DATE CHANGE
1								
2								
3								
4								
5								

DISCIPLINES | Discipline 1   **Discipline 2**   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Master Sales Team Meeting   Leader Application   Notes

6   HIGH IMPACT TEAM GOALS

TIME TO COMPLETE   **25 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

GOAL 1

SPECIFIC	
MEASURABLE	
ACTIONABLE	
REALISTIC	
TIME SPECIFIC	

GOAL 2

S	
M	
A	
R	
T	

GOAL 3

S	
M	
A	
R	
T	

GOAL 4

S	
M	
A	
R	
T	

TEAM DEVELOPMENT GOALS

S	
M	
A	
R	
T	

DISCIPLINES | Discipline 1 | **Discipline 2** | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | Discipline 9

Master Sales Team Meeting   Leader Application   Notes

MANAGING THE SALES MANAGERS:
The sales leader plays a key role too. These questions create a framework for the leader to follow.

LEADER APPLICATION
THE SALES LEADER'S ROLE:

DURING MASTER SALES TEAM MEETING WEEK, SALES
LEADERS SHOULD ASK SALES MANAGERS:

1 How is the team performing compared to target?

2 What are the top 5 current and next period opportunities you discussed and what were the key take-aways?

3 What are the non-revenue team goals you established or reviewed?

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Master Sales Team Meeting   Leader Application   Notes

NOTES

DISCIPLINE 3

LEARNING HUDDLES
WEEKLY TEAM MEETING

DISCIPLINES | Discipline 1   Discipline 2   **Discipline 3**   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Learning Huddles   Leader Application   Notes

3

DISCIPLINE 3
LEARNING HUDDLES
WEEKLY TEAM MEETING

PURPOSE   SHARING BEST PRACTICES AND IMPROVING SELLING ABILITY.

WHAT IT IS

Team Huddle is a weekly 60-minute team meeting led by one of the sales reps. The rep is responsible for preparing to lead discussion on a topic assigned by the manager. Topics should foster a best practice conversation around - a specific account, opportunity, process, skill or a tool.

DISCIPLINES | Discipline 1   Discipline 2   **Discipline 3**   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Learning Huddles   Leader Application   Notes

HOW TO DO IT

The Learning Huddle has continuous improvement written all over it. One of the best ways to stretch your reps is to let them share in the team's leadership. For starters, everybody takes a turn preparing to lead this weekly meeting. Each participant provides feedback and coaching. This invests everyone not only in the meeting but also in the team itself. In addition, the theme of each meeting brings everyone together around a specific topic of improvement. On a regular basis, they will analyze opportunities in detail, explore new skills, discover new tools, and expand their competencies. Through examining topics in depth, team synergy is created.

ALL PERFORMANCE DEPENDS ON PERSONAL ENGAGEMENT. TO RAISE PERFORMANCE, TEAM MEMBERS SHOULD SHARE IN THEIR OWN LEADERSHIP.

DISCIPLINES | Discipline 1   Discipline 2   **Discipline 3**   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Learning Huddles   Leader Application   Notes

60
MINUTE MEETING
AGENDA
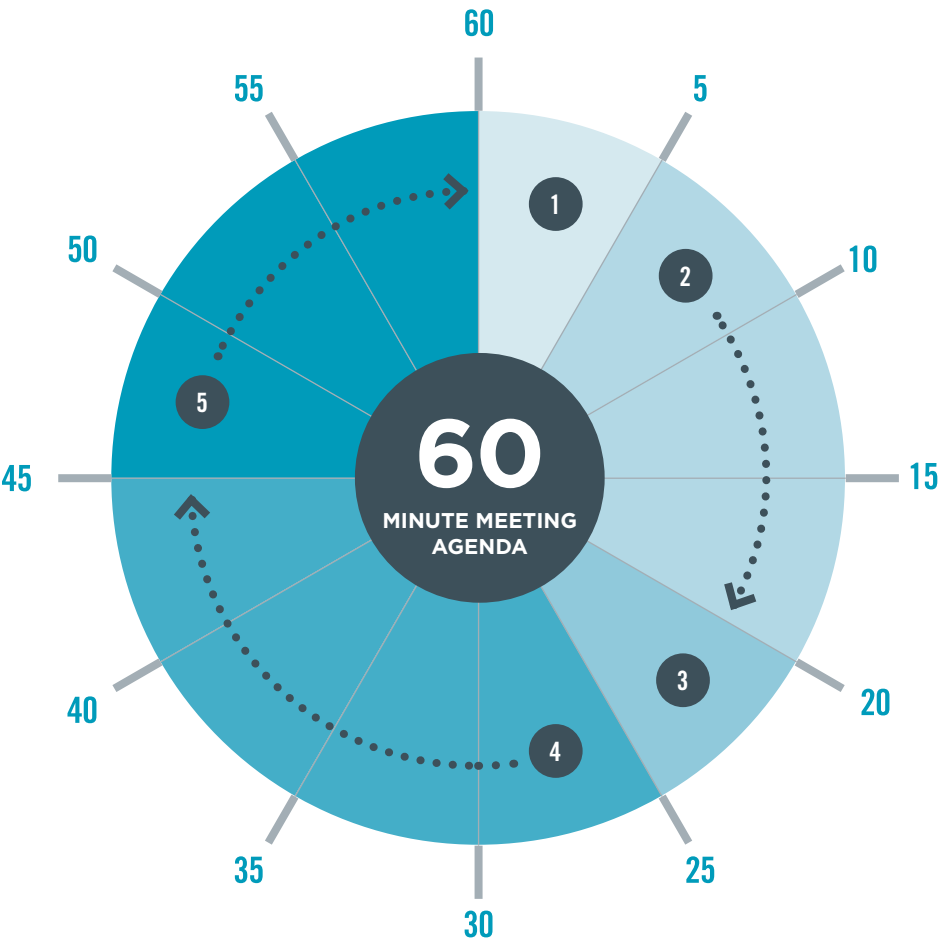
1   5 minutes

PERFORMANCE REVIEW

Begin with a general status brief to review the current situation for the team. Look for issues that might provide a natural segue into the focus topic.

2   15 minutes

SELLER OVERVIEW OF FOCUS

Introduce the team member who will teach the focus topic. Step out of the way and let him or her drive, completely owning the situation.

3   5 minutes

TEAM QUESTIONS

The team member should open the floor for questions from others. The manager can ask questions, but try to let the team self-lead.

DISCIPLINES   Discipline 1   Discipline 2   **Discipline 3**   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Learning Huddles   Leader Application   Notes

60
MINUTE MEETING
AGENDA
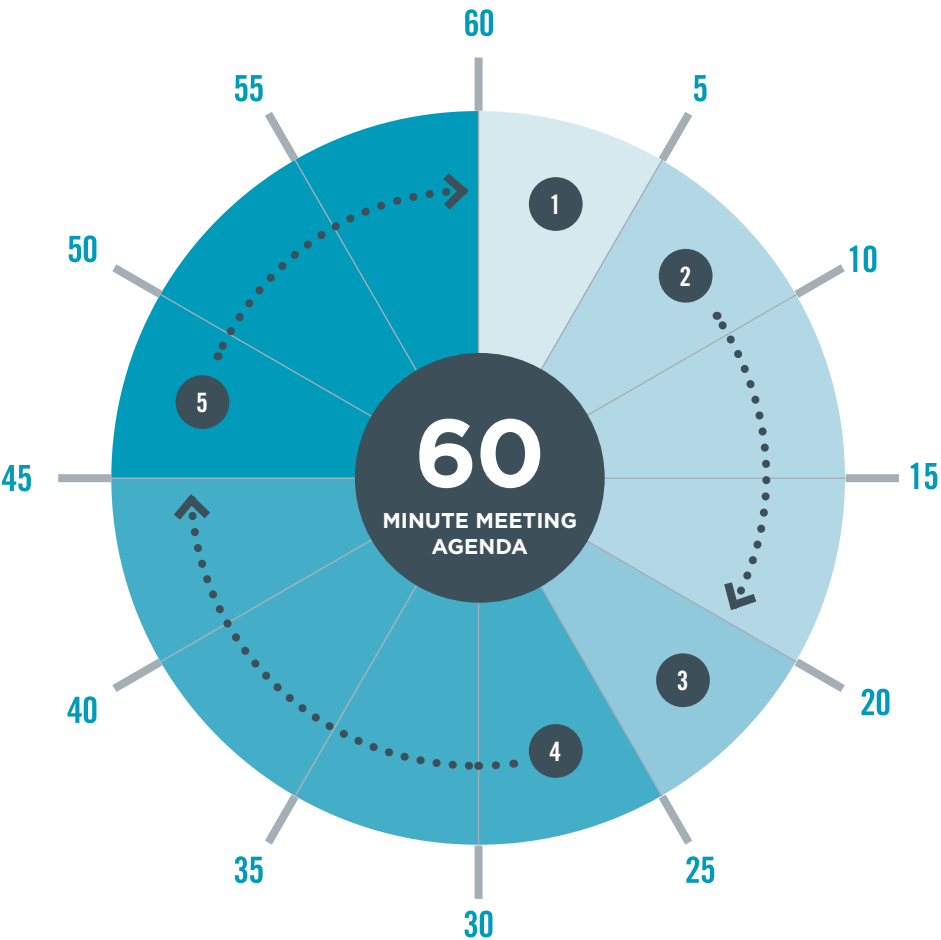
4

20 minutes

TEAM BRAINSTORMS

Team brainstorm is designed for creating specific ideas for applying what has been learned. Use situations from the performance review if possible.

5

15 minutes

ACTION PLANNING
& UPDATES

Finally, team members make commitments going forward. And look for ways to apply the focus topic as appropriate.

DISCIPLINES | Discipline 1 | Discipline 2 | **Discipline 3** | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | Discipline 9

Learning Huddles | Leader Application | Notes

LEARNING HUDDLES

MANAGER PREPARES BY:

- Review dashboards
- Select 3 focus metrics
- Select focus topic
- Assign topic to seller
- Review Huddle Planner
- Assign note taker
- Schedule call
- Follow agenda

SELLER PREPARES BY:

- Prepares & submits HuddlePlanner
- Prepares to present & discuss with team

OPTION 1
OPPORTUNITIES

Focus on one opportunity. Alternate between

1. New
2. Emerging
3. Established opportunities

OPTION 2
ACCOUNTS

Focus on a single account. Alternate between

1. New
2. Emerging
3. Established accounts

OPTION 3
EFFECTIVENESS

Focus on a single

1. Skill
2. Process
3. Competitor
4. Tool

DISCIPLINES | Discipline 1 Discipline 2 **Discipline 3** Discipline 4 Discipline 5 Discipline 6 Discipline 7 Discipline 8 Discipline 9

Learning Huddles   Leader Application   Notes

OPPORTUNITY HUDDLE PLANNER
Use this planner to prepare your meeting.

SALES MAKER SUBMITS THIS PLANNER TO MANAGER IN ADVANCE

REP NAME

ACCOUNT NAME

OPPORTUNITY NAME

BUSINESS PROBLEM

BUSINESS OWNER(S)

FUNDING OWNER(S)

VALUE TO CUSTOMER

SOLUTION OPTIONS

BEST OPTION

OBSTACLES

COMPETITION

BUDGET

NEXT STEPS

KEY ACTION ITEMS

What are the 3 things I need to do moving forward.

1

2

3

DISCIPLINES | Discipline 1   Discipline 2   **Discipline 3**   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Learning Huddles   Leader Application   Notes

ACCOUNT HUDDLE PLANNER

Use this planner to prepare your meeting.

SALES MAKER SUBMITS THIS PLANNER TO MANAGER IN ADVANCE

REP NAME

ACCOUNT NAME

TOTAL WON YTD COMPARE TO SAME PERIOD PREVIOUS YEAR

ACCOUNT TARGET

TOTAL WON IN-PERIOD COMPARED TO SAME PERIOD PREVIOUS YEAR

TOTAL PIPELINE IN-PERIOD

TOTAL PIPELINE OUT-PERIOD

PRODUCT/SERVICE MIX SOLD COMPARED TO PREVIOUS YEAR

BUSINESS CLIMATE IMPACT, OPPORTUNITIES AND THREATS

TOP THREE OPEN OPPORTUNITIES

COMPETITION

STRATEGY (GROWTH, RETENTION, HIBERNATE, ABANDON)

KEY ACTION ITEMS

What are the 3 things I need to do moving forward.

1

2

3

DISCIPLINES | Discipline 1 | Discipline 2 | **Discipline 3** | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | Discipline 9

Learning Huddles | Leader Application | Notes

EFFECTIVENESS HUDDLES

YOU CAN RUN EFFECTIVENESS HUDDLES ON NEARLY ANY TOPIC.

!

THE KEY IS TO MAKE THEM INTERACTIVE AND MAKE SURE THAT A SALES REP IS RESPONSIBLE FOR LEADING THE SESSION.

Here are some topical ideas for Effectiveness Huddles

1. Empower Your Team to Get More Referrals
2. Help Your Team Focus on the Customer Instead of Themselves
3. Strengthen Your Team's Ability to Develop Strategic Accounts
4. Developing Key Contacts to Help Penetrate a Strategic Account
5. How to Quickly Build Rapport
6. Quick Strategies to Improve Sales Presentations
7. Getting Control of Email
8. Sell Consultatively to Build Trust and Close Bigger Deals
9. Handling Objections
10. Teach Your Team to Leverage Influence Tactics to Move the Deal Forward
11. Help Your Team Turn Rejection Into Motivation
12. Give Your Team Proven Strategies to Improve Closing Rates

13. Boost Your Team's Ability to Maintain a Positive Attitude
14. Teach Your Team to Work Effectively with Different Customer Behavior Styles
15. Teach Your Team to Manage Their Emotional Intelligence
16. Handling Concessions During a Sales Negotiation
17. Train Your Team in the Use of Effective Questioning Skills to Uncover More Opportunities
18. Best Practices for Effective Account Planning
19. Best Practices for Effective Territory Planning
20. Empower Your Team to Become More Effective at Connecting with Leaders and Executives
21. Best Practices for Effective Cold Calling
22. Leaving a Compelling Voicemail Message

IF WE WANT TO DIRECT OUR LIVES, WE MUST TAKE CONTROL OF OUR CONSISTENT ACTIONS. IT'S NOT WHAT WE DO ONCE IN A WHILE THAT SHAPES OUR LIVES, BUT WHAT WE DO CONSISTENTLY.

DISCIPLINES | Discipline 1 Discipline 2 **Discipline 3** Discipline 4 Discipline 5 Discipline 6 Discipline 7 Discipline 8 Discipline 9
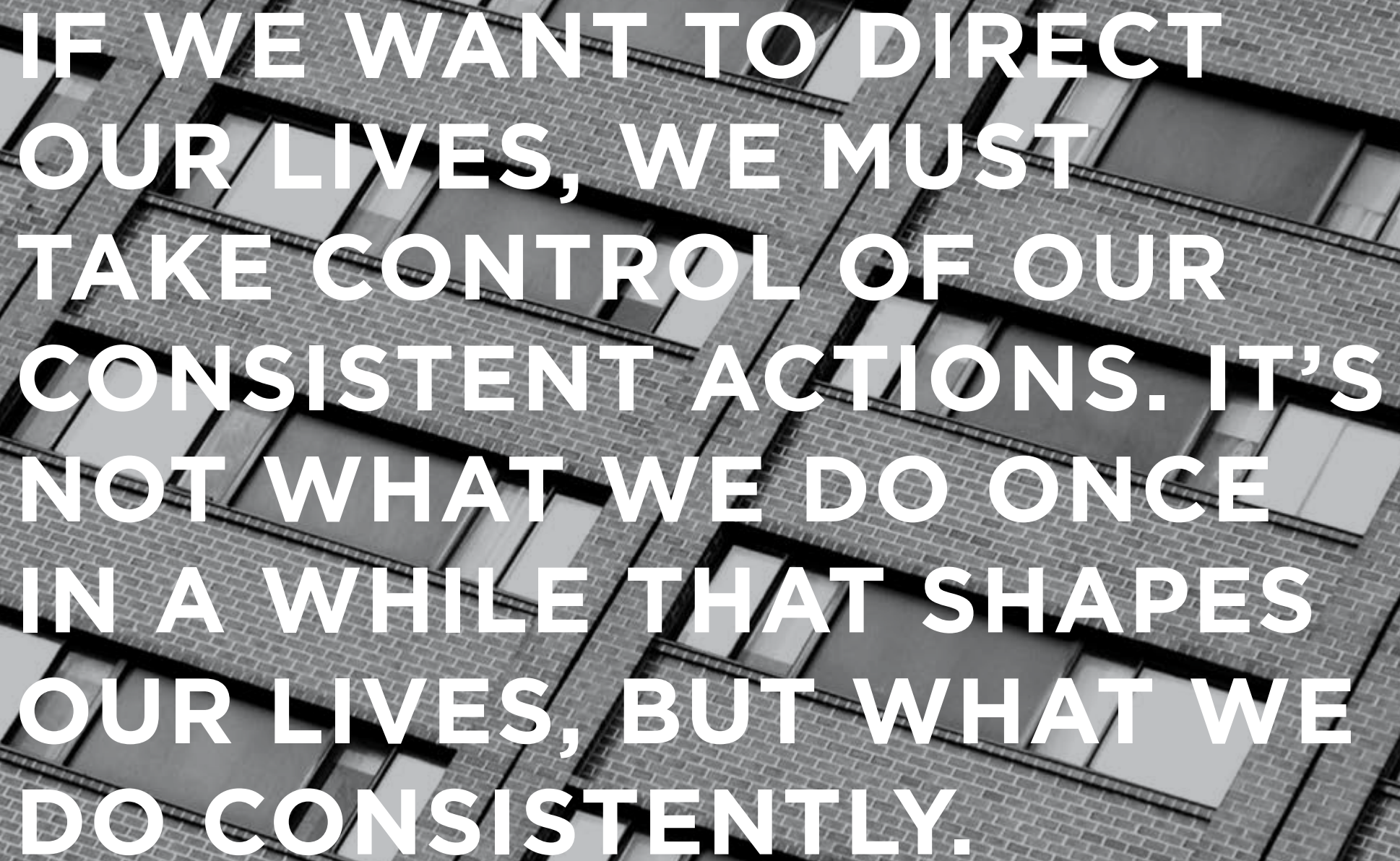
Learning Huddles   Leader Application   Notes

MANAGING THE SALES MANAGERS:
The sales leader plays a key role too. These questions create a framework for the leader to follow.

LEADER APPLICATION
THE SALES LEADER'S ROLE:

DURING TEAM HUDDLE WEEK, SALES LEADERS SHOULD ASK
SALES MANAGERS:

1 **What was the Huddle focus and who was the presenter?**

2 **What were the top three take-aways from the Huddle?**

3 **What Huddle topics are you considering for your next Huddle?**

DISCIPLINES   Discipline 1   Discipline 2   **Discipline 3**   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Learning Huddles   Leader Application   Notes

NOTES

DISCIPLINE 4

DAILY RESULTS CALL

TEAM MEETING HELD DAILY DURING THE LAST 2 WEEKS OF THE BUSINESS CYCLE

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   **Discipline 4**   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Daily Results Call   Leader Application   Notes

DISCIPLINE 4

DAILY RESULTS CALL

TEAM MEETING HELD DAILY DURING THE LAST 2 WEEKS OF THE BUSINESS CYCLE

PURPOSE   INCREASE VISIBILITY AS THE REPORTING PERIOD DRAWS TO A CLOSE, LEVERAGING PEER PRESSURE, INSPIRING TEAM COMPETITION, AND REVEALING FORECAST GAPS.

WHAT IT IS   You've worked hard … Finish strong! Daily Results Calls are daily 60-minute review sessions used to close out each day during the last two weeks of a reporting period. Most appropriate for transactional sales situations, these meetings raise the manager's influence during the critical final days of the cycle.

DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | **Discipline 4** | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | Discipline 9

Daily Results Call | Leader Application | Notes

HOW TO DO IT

Down the home stretch of the reporting period, Daily Results Calls send a message to the team that helps to heighten their faculties. Daily visibility and accountability become powerful levers that inspire competition. The team gathers to review the previous day's wins, the current day's committed actions, and the next day's wins and committed actions. Reps and managers focus on opportunities with close dates inside the reporting period. They also look for upside deals from future reporting periods that have acceleration potential. By increasing the frequency of meetings as the cycle draws to a close, you communicate an expectation about intensity. Your reps will adjust their cadence to match yours.

CADENCE DETERMINES INTENSITY. BY RAISING FREQUENCY DOWN THE STRETCH, YOU HELP TO RAISE INTENSITY IN YOUR REPS.

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   **Discipline 4**   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Daily Results Call   Leader Application   Notes

60
MINUTE MEETING
AGENDA
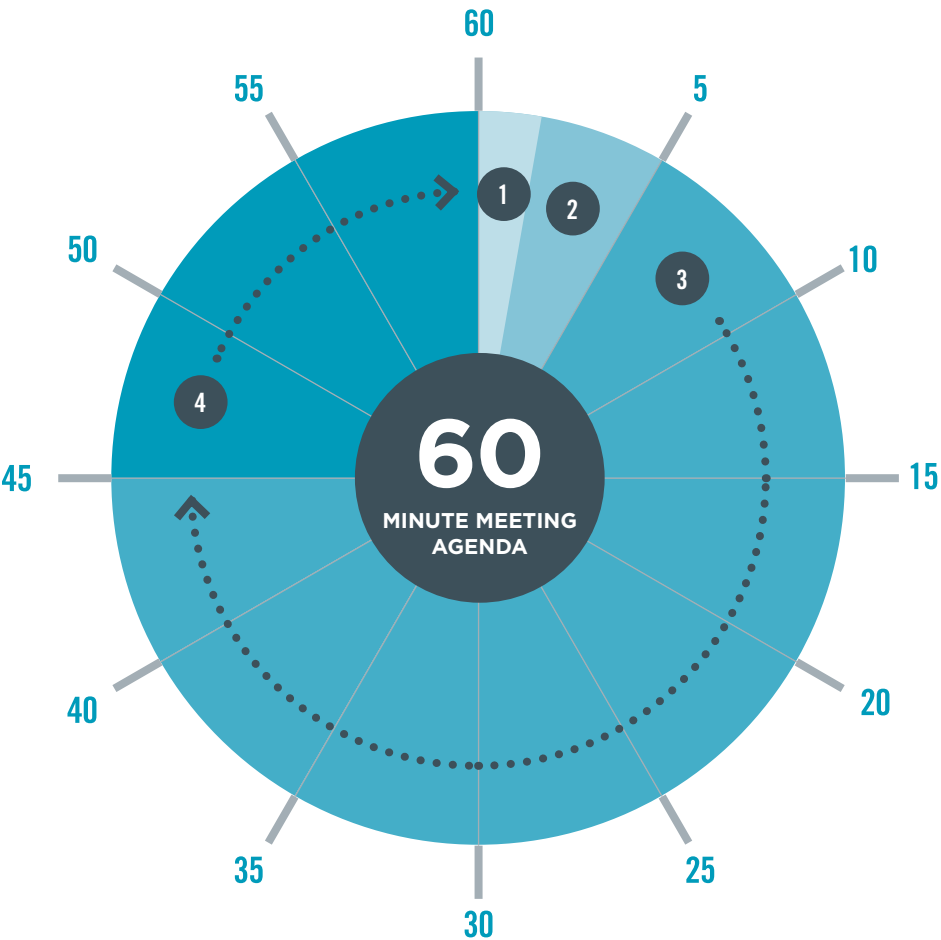
1 — 2 minutes
GAP TO TARGET

Start the meeting with a "state of the quota" recap. This helps remind reps of the quota and the remaining work to meet it.

2 — 3 minutes
WINS FROM THE DAY

Celebrate the wins since the last meeting. More importantly, celebrate the behaviors that produced those wins.

3 — 40 minutes
COMMIT FOR TOMORROW

Focus the team by going over each rep's commits for the current (upcoming) day. Validate that the deals qualify for the commit status.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   **Discipline 4**   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Daily Results Call   Leader Application   Notes
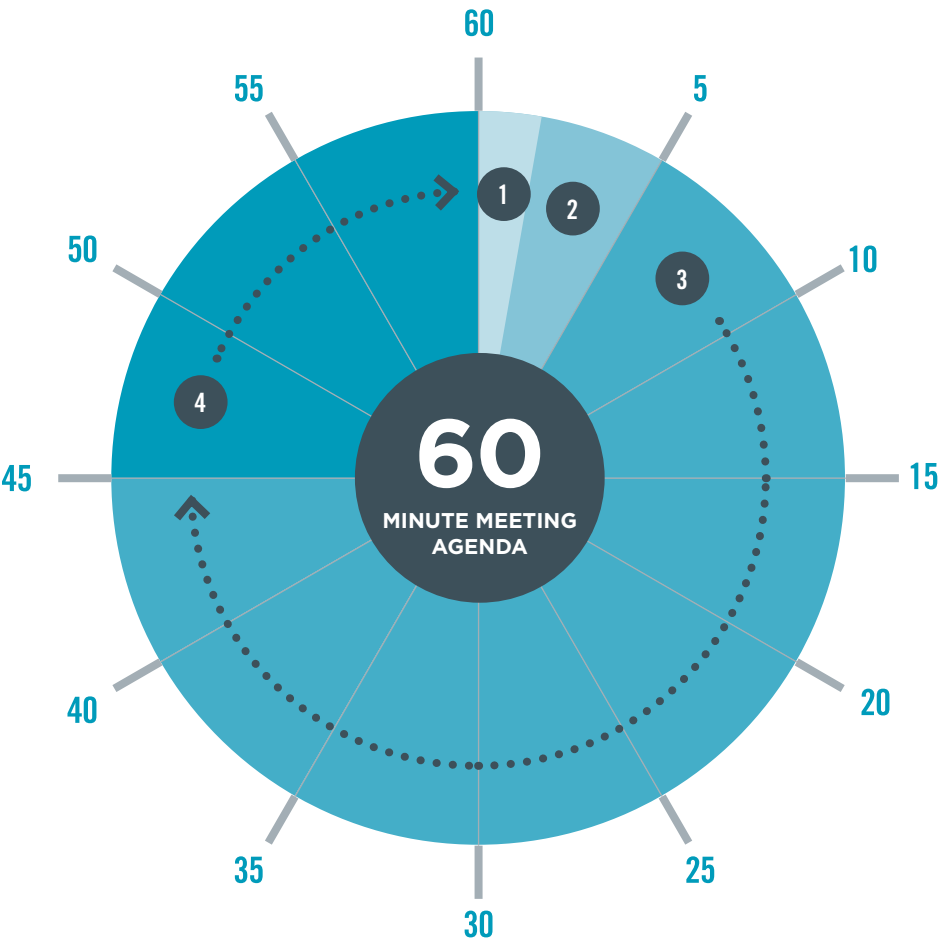
4   15 minutes

POSSIBLE UPSIDE

The final fifteen minutes can be used to look at additional opportunities that might be candidates for commit status to help close the quota gap.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   **Discipline 4**   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Daily Results Call   Leader Application   Notes

1 GAP TO TARGET

TIME TO COMPLETE **2 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

IN-PERIOD TARGET

GAP TO TARGET

TOTAL FORECAST

2 WINS FROM THE DAY

TIME TO COMPLETE **3 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

WINS FROM THE DAY

VARIANCE OR PREVIOUS DAY "COMMITS"

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   **Discipline 4**   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Daily Results Call   Leader Application   Notes

3 COMMIT FOR TOMORROW

TIME TO COMPLETE **40 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

COMMITS FOR TOMORROW	VALUE	RISK
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   **Discipline 4**   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Daily Results Call   Leader Application   Notes

4   POSSIBLE UPSIDE

TIME TO COMPLETE   **15 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

POSSIBLE UPSIDE	VALUE	ACCELERATION STRATEGY UPDATE
1		
2		
3		
4		
5		

WHAT THE SALES MANAGER MANAGES ARE THE TEAM'S RESOURCES. AND CHIEF AMONG THOSE RESOURCES IS THEIR FOCUS.

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   **Discipline 4**   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Daily Results Call   Leader Application   Notes

MANAGING THE SALES MANAGERS:
The sales leader plays a key role too. These questions create a framework for the leader to follow.

LEADER APPLICATION
THE SALES LEADER'S ROLE:

DURING DAILY RESULTS CALL WEEKS, SALES LEADERS
SHOULD ASK SALES MANAGERS:

1   **What did your team close yesterday?**

2   **What is the forecast now and what changed?**

3   **What is the upside?**

DISCIPLINES

Discipline 1   Discipline 2   Discipline 3   **Discipline 4**   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Daily Results Call   Leader Application   Notes

NOTES

DISCIPLINES | Discipline 1 Discipline 2 Discipline 3 **Discipline 4** Discipline 5 Discipline 6 Discipline 7 Discipline 8 Discipline 9

Daily Results Call   Leader Application   Notes

NOTES

DISCIPLINE 5

———

FORECAST 1:1 MEETING
ONE-ON-ONE MEETING AT REGULAR INTERVALS
THROUGHOUT THE BUSINESS CYCLE

DISCIPLINES | Discipline 1 Discipline 2 Discipline 3 Discipline 4 **Discipline 5** Discipline 6 Discipline 7 Discipline 8 Discipline 9

Forecast 1:1 Meeting Leader Application Notes

DISCIPLINE 5

FORECAST 1:1 MEETING

ONE-ON-ONE MEETING AT REGULAR INTERVALS THROUGHOUT THE BUSINESS CYCLE

PURPOSE ACCURATELY PROJECT DEALS THAT WILL CLOSE INSIDE THE REPORTING PERIOD AND IDENTIFY TIMELY STRATEGIES FOR CLOSING THE DEALS.

WHAT IT IS

Everybody's different. So spend time with each rep, one-on-one. Forecast 1:1 meetings are one-on-one meetings between the manager and the rep conducted periodically to discuss leads and opportunities with close dates inside the current reporting period. Be sure to check out the bonus chapter at the end of this book to learn more about personal influence.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   **Discipline 5**   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Forecast 1:1 Meeting   Leader Application   Notes

HOW TO DO IT

The Forecast 1:1 is intended to improve the accuracy of the forecast while helping reps identify strategies to close more opportunities. It enables the manager and the rep to level-set on opportunities with close dates inside the reporting period. These meetings should be conducted according to a predictable routine. You'll want to optimize the cadence to produce the best results based on your sales cycle. Using verifiable outcomes for each sales stage, managers can assess the likelihood of closing the opportunity and refine strategies to help the process. The ultimate goal is to help the rep succeed and look for ways to close any quota gaps.

SEPARATING FORECAST FROM PIPELINE IS ESSENTIAL FOR EFFECTIVELY MANAGING BOTH.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   **Discipline 5**   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Forecast 1:1 Meeting   Leader Application   Notes

60
MINUTE MEETING
AGENDA
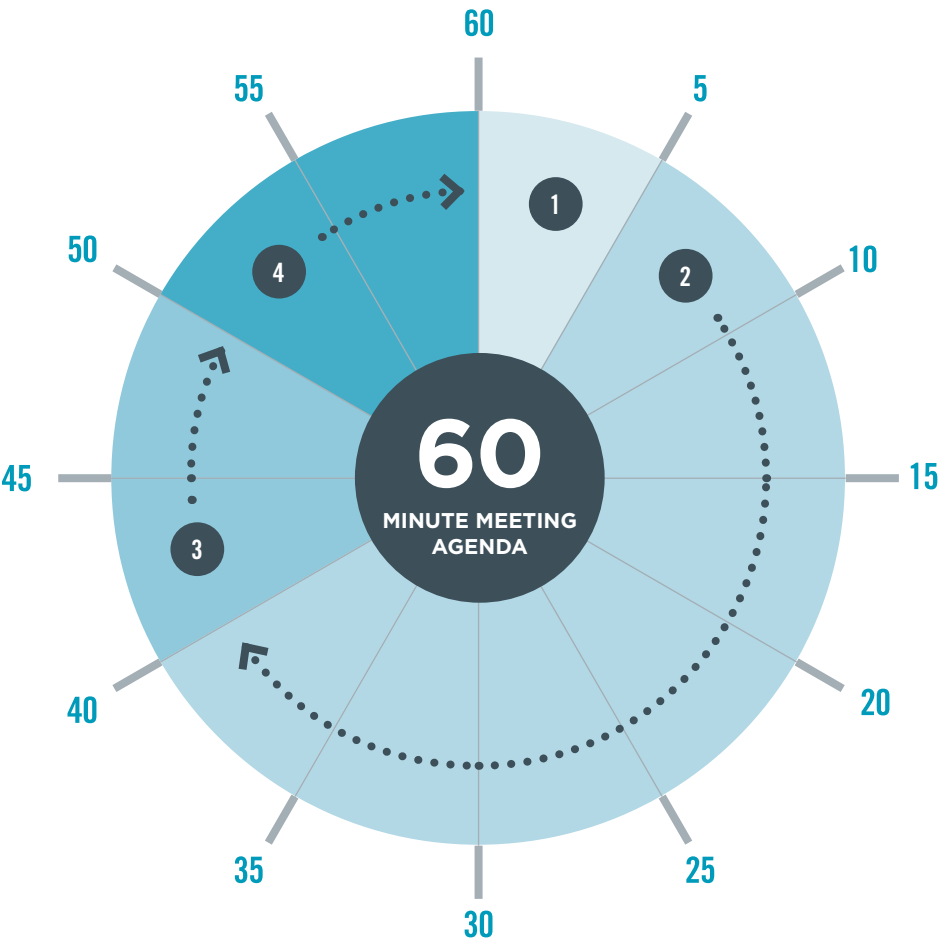
1 — 5 minutes
PERSONAL METRICS REVIEW

This meeting is about the current period. Review the metrics and isolate near term opportunities.

2 — 35 minutes
TOP 10 OPEN OPPORTUNITIES

Review in detail the verifiable outcomes associated with each stage for these opportunities. This focus will help reps concentrate their efforts where they matter most.

3 — 10 minutes
TOP 5 UPSIDE

Look for other opportunities that can be pulled into the current reporting period. This will give you some cushion in case deals you are forecasting do not close.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   **Discipline 5**   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Forecast 1:1 Meeting   Leader Application   Notes

4
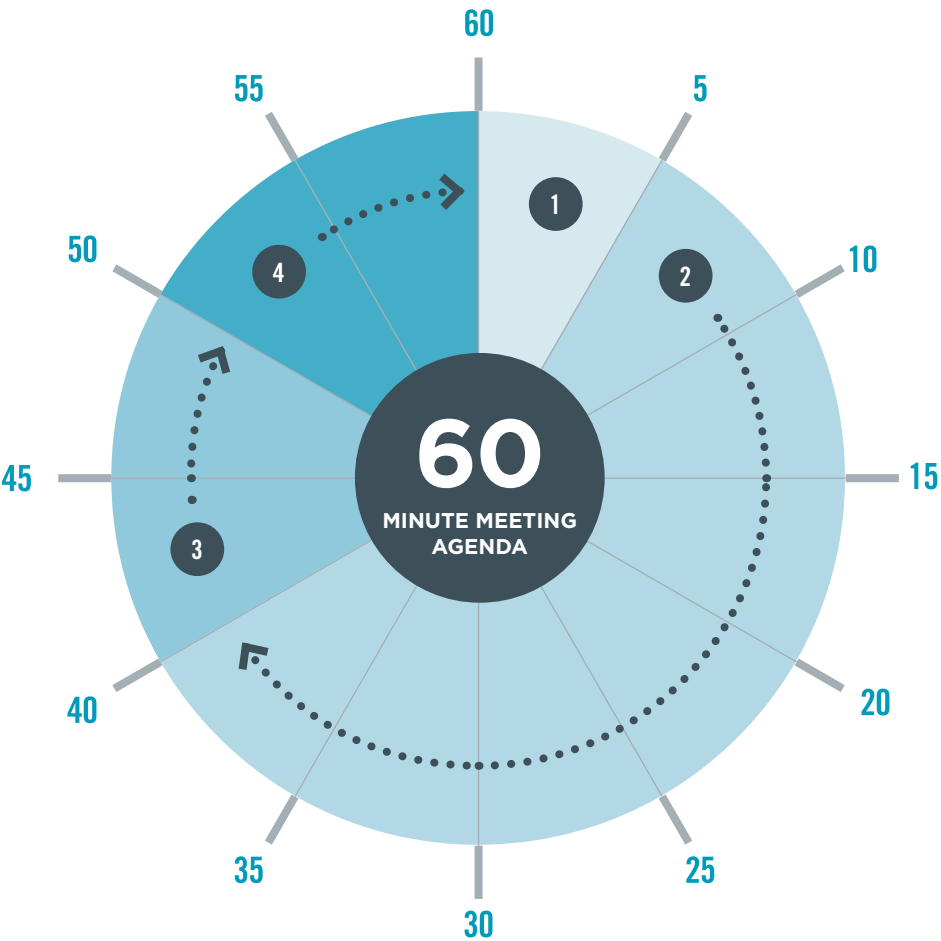
10 minutes

GOALS FOR NEXT REVIEW

Identify specific actions, as well as their desired outcomes. This sets the stage for your next Forecast 1:1.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   **Discipline 5**   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Forecast 1:1 Meeting   Leader Application   Notes

1   PERSONAL METRICS REVIEW

TIME TO COMPLETE   **5 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

TOTAL VALUE OF FORECAST

CHANGE SINCE LAST REVIEW + OR -

NUMBER OF OPPORTUNITIES IN FORECAST

CHANGE SINCE LAST REVIEW + OR -

POSSIBLE UPSIDE FROM FUTURE PERIOD

CHANGE SINCE LAST REVIEW + OR -

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   **Discipline 5**   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Forecast 1:1 Meeting   Leader Application   Notes

2 TOP 10 OPEN OPPORTUNITIES

TIME TO COMPLETE ▶ **20 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

TOP 10 OPEN OPPS	VALUE	NEXT STEP TO ADVANCE
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

DISCIPLINES | Discipline 1 Discipline 2 Discipline 3 Discipline 4 **Discipline 5** Discipline 6 Discipline 7 Discipline 8 Discipline 9

Forecast 1:1 Meeting   Leader Application   Notes

3 TOP 5 UPSIDE

TIME TO COMPLETE ► **10 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

TOP 5 UPSIDE	VALUE	IDEAS TO ACCELERATE
1		
2		
3		
4		
5		

DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | Discipline 4 | **Discipline 5** | Discipline 6 | Discipline 7 | Discipline 8 | Discipline 9

Forecast 1:1 Meeting   Leader Application   Notes

4 GOALS FOR NEXT REVIEW

TIME TO COMPLETE ▸ **10 MINUTES**   Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

GOALS			
SPECIFIC		**S**	
MEASURABLE		**M**	
ACTIONABLE		**A**	
REALISTIC		**R**	
TIME SPECIFIC		**T**	

THE MEETING OF PREPARATION WITH OPPORTUNITY GENERATES THE OFFSPRING WE CALL LUCK.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   **Discipline 5**   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Forecast 1:1 Meeting   Leader Application   Notes

MANAGING THE SALES MANAGERS:
The sales leader plays a key role too. These questions create a framework for the leader to follow.

LEADER APPLICATION
THE SALES LEADER'S ROLE:

DURING FORECAST 1:1 WEEK, SALES LEADERS SHOULD ASK SALES MANAGERS:

1   **What is the forecast for the current period?**

2   **What changed and why?**

3   **What specifically will you do to to close the gap and improve the results?**

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   **Discipline 5**   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Forecast 1:1 Meeting   Leader Application   Notes

NOTES

DISCIPLINE 6

——

PIPELINE 1:1 MEETING

ONE-ON-ONE MEETING AT REGULAR INTERVALS
THROUGHOUT THE BUSINESS CYCLE

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   **Discipline 6**   Discipline 7   Discipline 8   Discipline 9

Pipeline 1:1 Meeting   Leader Application   Notes

DISCIPLINE 6

PIPELINE 1:1 MEETING

ONE-ON-ONE MEETING AT REGULAR INTERVALS THROUGHOUT THE BUSINESS CYCLE

PURPOSE

PROACTIVE PIPELINE GAP PLANNING, IMPROVED PIPELINE-TO-QUOTA RATIO, AND SETTING UP SUCCESS OF FUTURE PERIODS.

WHAT IT IS

Emotionally, filling the pipeline is the hardest part of sales. Reps need your coaching and encouragement! Pipeline 1:1 Meetings are one-on-one meetings between the manager and the rep conducted periodically to discuss leads and opportunities with close dates outside the current reporting period.

DISCIPLINES | Discipline 1　　Discipline 2　　Discipline 3　　Discipline 4　　Discipline 5　　**Discipline 6**　　Discipline 7　　Discipline 8　　Discipline 9

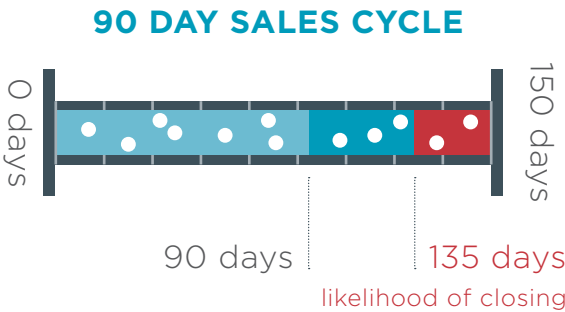Pipeline 1:1 Meeting　　　Leader Application　　　Notes

HOW TO DO IT

The Pipeline 1:1 Meeting is intended to separate early stage opportunities from current activity to create better focus on building success in the future. The outcome of this meeting is to ensure the reps are building pipelines that not only serve the current reporting period, but also ensure positive results in the future. This also helps to alleviate the pressure on reps to "fill the front of the funnel." To manage the pipeline-to-quota ratio, set a multiple and measure progress against that benchmark at each meeting (3 is the multiple most commonly used by organizations). These meetings should be conducted according to a predictable routine. Again, optimize the cadence to produce the best results based on your sales cycle.

PIPELINE FACTS:

In more than 65% of cases, reps put their deals in when they are at later stages so they don't have to be burdened with questions. But managers can't manage if there's no visibility.

90 DAY SALES CYCLE

0 days　　　　　　　　　　　　　　　150 days

90 days　　　　135 days
likelihood of closing

THE MORE DEALS EXTENDED PAST YOUR SALES CYCLE, THE MORE DEALS YOU LOSE.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   **Discipline 6**   Discipline 7   Discipline 8   Discipline 9

Pipeline 1:1 Meeting   Leader Application   Notes

60
MINUTE MEETING
AGENDA
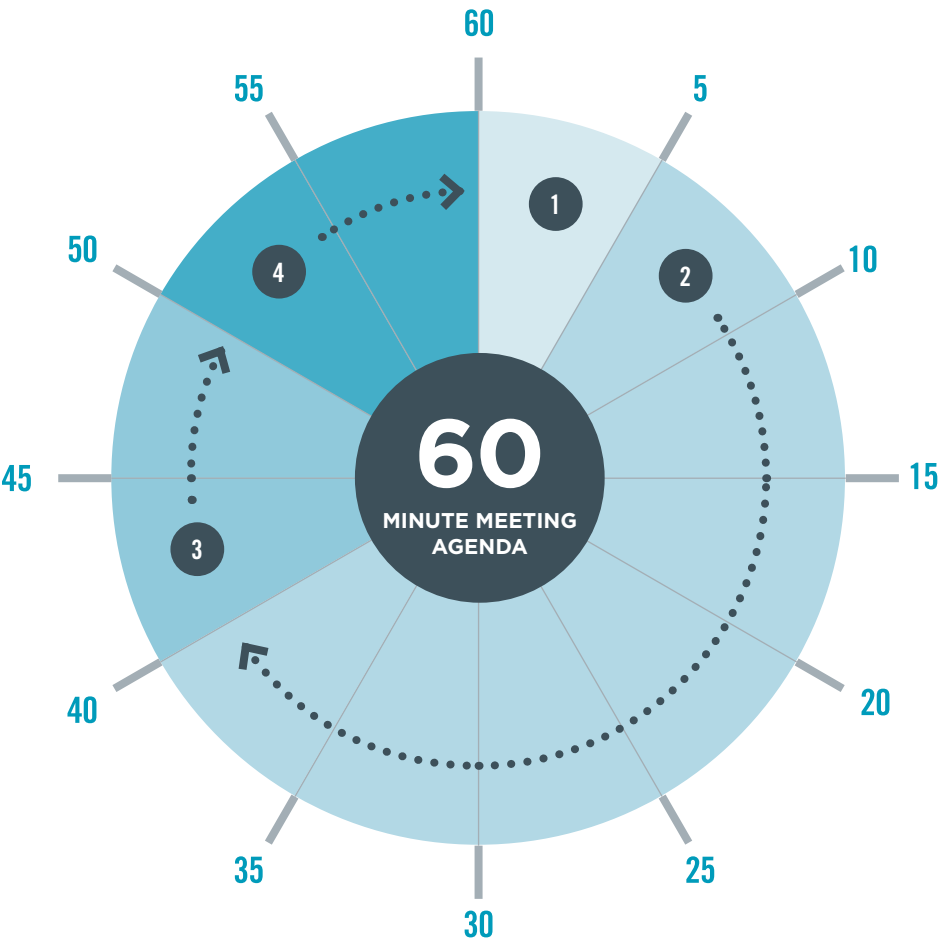
1   5 minutes

PERSONAL PIPELINE METRICS REVIEW

Preparing for the next business cycle can be an ongoing struggle. Adherence to this discipline helps to bring it into focus to keep a balanced attack.

2   35 minutes

TOP 10 OPEN OPPORTUNITIES

Spend about twenty minutes prioritizing the open opportunities and identifying the top ten.

3   10 minutes

TOP 5 PROSPECTING OPPORTUNITIES

Suggest activities that will ensure the rep continues to prospect and identify new opportunities to fill the funnel.

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   **Discipline 6**   Discipline 7   Discipline 8   Discipline 9

Pipeline 1:1 Meeting   Leader Application   Notes

4

10 minutes

GOALS FOR NEXT REVIEW

Focus on the steps that the rep can accomplish in order to move the process closer to designing the solution and proposing it. Hold the rep accountable to behaviors around these goals.
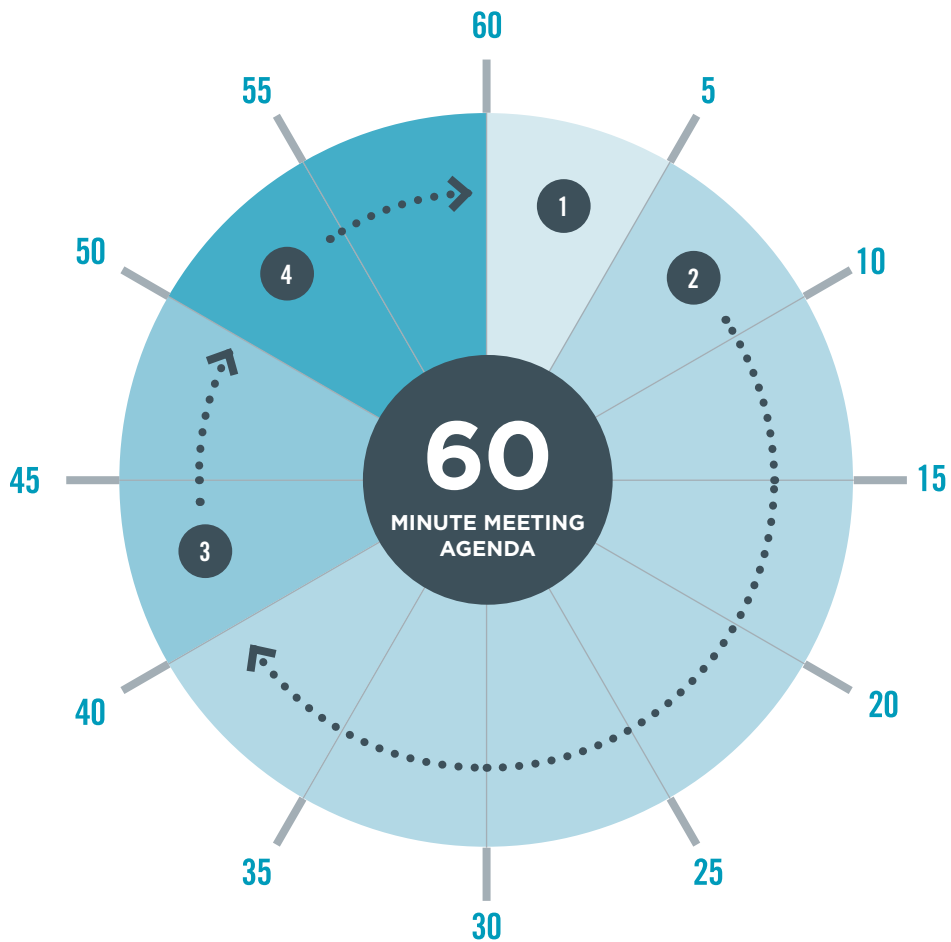
DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | Discipline 4 | Discipline 5 | **Discipline 6** | Discipline 7 | Discipline 8 | Discipline 9

Pipeline 1:1 Meeting | Leader Application | Notes

1 PERSONAL PIPELINE METRICS REVIEW

TIME TO COMPLETE ❯ **5 MINUTES**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

TOTAL VALUE OF OUT-PERIOD PIPELINE

CHANGE SINCE LAST REVIEW + OR -

NUMBER OF OPPORTUNITIES IN OUT-PERIOD PIPELINE

CHANGE SINCE LAST REVIEW + OR -

TOTAL PIPELINE VALUE VS. MULTIPLE

CHANGE SINCE LAST REVIEW + OR -

DISCIPLINES | Discipline 1　　Discipline 2　　Discipline 3　　Discipline 4　　Discipline 5　　**Discipline 6**　　Discipline 7　　Discipline 8　　Discipline 9

Pipeline 1:1 Meeting　　　Leader Application　　　Notes

② TOP 10 OPEN OPPORTUNITIES

TIME TO COMPLETE ▶ **20 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   **Discipline 6**   Discipline 7   Discipline 8   Discipline 9

Pipeline 1:1 Meeting   Leader Application   Notes

3   TOP 5 PROSPECTING OPPORTUNITIES

TIME TO COMPLETE   **10 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

1	
2	
3	
4	
5	

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   **Discipline 6**   Discipline 7   Discipline 8   Discipline 9

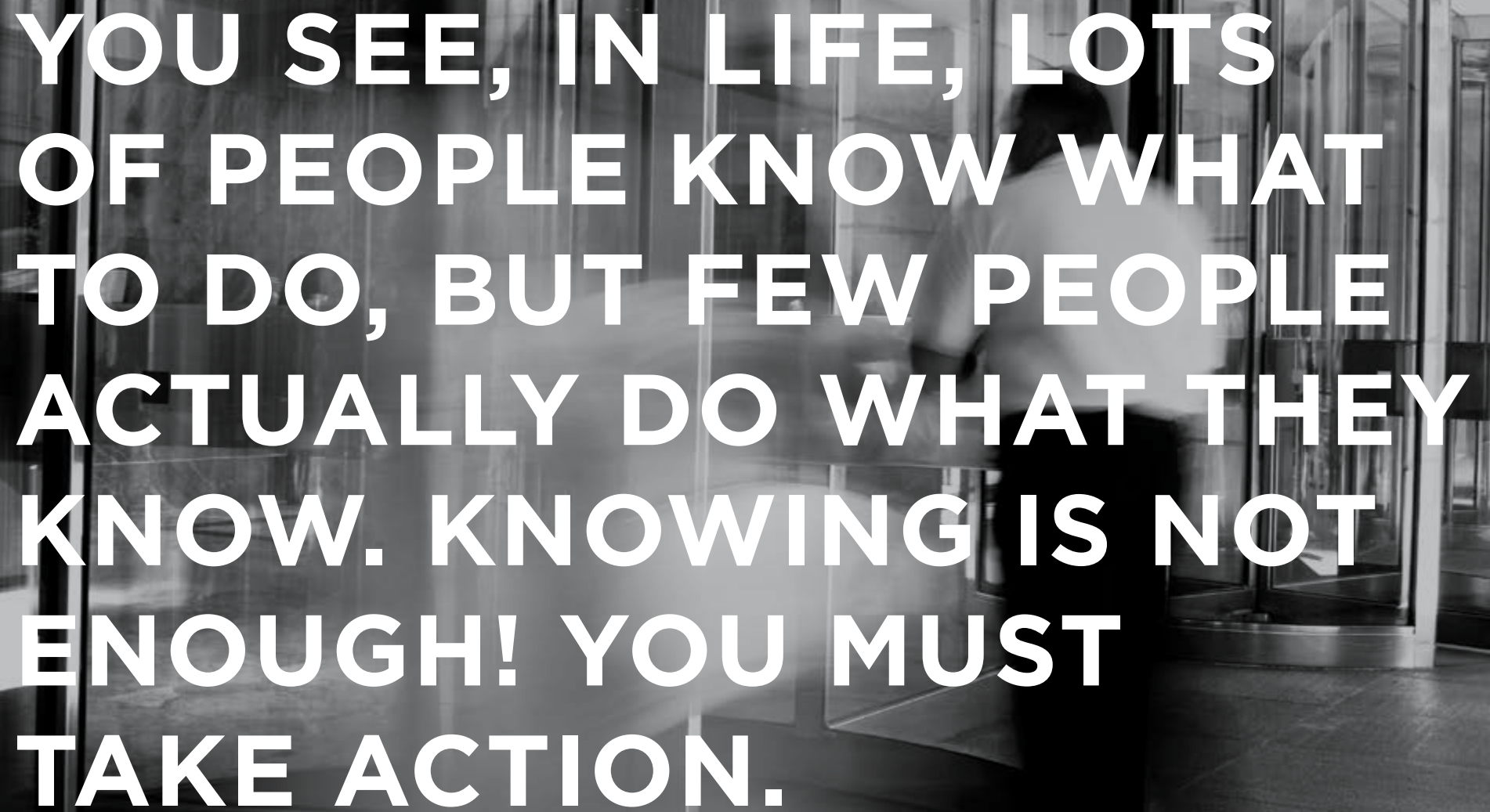Pipeline 1:1 Meeting   Leader Application   Notes

4   GOALS FOR NEXT REVIEW

TIME TO COMPLETE ▸ **10 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

GOALS		
SPECIFIC	S	
MEASURABLE	M	
ACTIONABLE	A	
REALISTIC	R	
TIME SPECIFIC	T	

YOU SEE, IN LIFE, LOTS OF PEOPLE KNOW WHAT TO DO, BUT FEW PEOPLE ACTUALLY DO WHAT THEY KNOW. KNOWING IS NOT ENOUGH! YOU MUST TAKE ACTION.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   **Discipline 6**   Discipline 7   Discipline 8   Discipline 9

Pipeline 1:1 Meeting   Leader Application   Notes

MANAGING THE SALES MANAGERS:
The sales leader plays a key role too. These questions create a framework for the leader to follow.

LEADER APPLICATION
THE SALES LEADER'S ROLE:

DURING PIPELINE 1:1 MEETING WEEK, SALES LEADERS SHOULD
ASK SALES MANAGERS:

1   **What is the team pipeline-to-quota ratio?**

2   **Who has the lowest pipeline-to-quota ratio?**

3   **What changed since the last report and why?**

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   Discipline 9

Pipeline 1:1 Meeting   Leader Application   Notes

NOTES

DISCIPLINE 7

——

RIDE-ALONG / CALL-ALONG
ONE-ON-ONE ACTIVITY

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

7

DISCIPLINE 7

RIDE-ALONG / CALL-ALONG

ONE-ON-ONE ACTIVITY

PURPOSE   CONTINUOUS IMPROVEMENT OF SALES MEETINGS THROUGH PRE-CALL PLANNING, POST-CALL DEBRIEFING, AND COACHING.

WHAT IT IS

Don't run the sales call for your rep. Use this time to observe and coach. Pre-call planning and post-call debriefing are essential techniques for sales performance continuous improvement. And applying them to the essential skills of the sales meeting is one of the best ways to impact performance.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

HOW TO DO IT

The Ride Along / Call Along is a one-on-one coaching engagement between the manager and the rep. The frequency and timing of this activity should be gauged around the sales cycle. Don't make the mistake of basing this on perceived need or relative performance. There's always room for improvement, and your commitment should be consistent and routine. The manager and rep should design a Ride-Along plan that gives a cross-section of calls at different stages of the opportunity cycle. Use the tools that follow to brief and debrief, and to compare outcomes. The manager should only observe during the call. Debrief immediately, beginning with the rep's self-evaluation and feedback. Then the manager gives positive feedback, followed by constructive critique.

THE WAY WE COMMUNICATE WITH OTHERS AND WITH OURSELVES ULTIMATELY DETERMINES THE QUALITY OF OUR LIVES.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

60
MINUTE MEETING
AGENDA
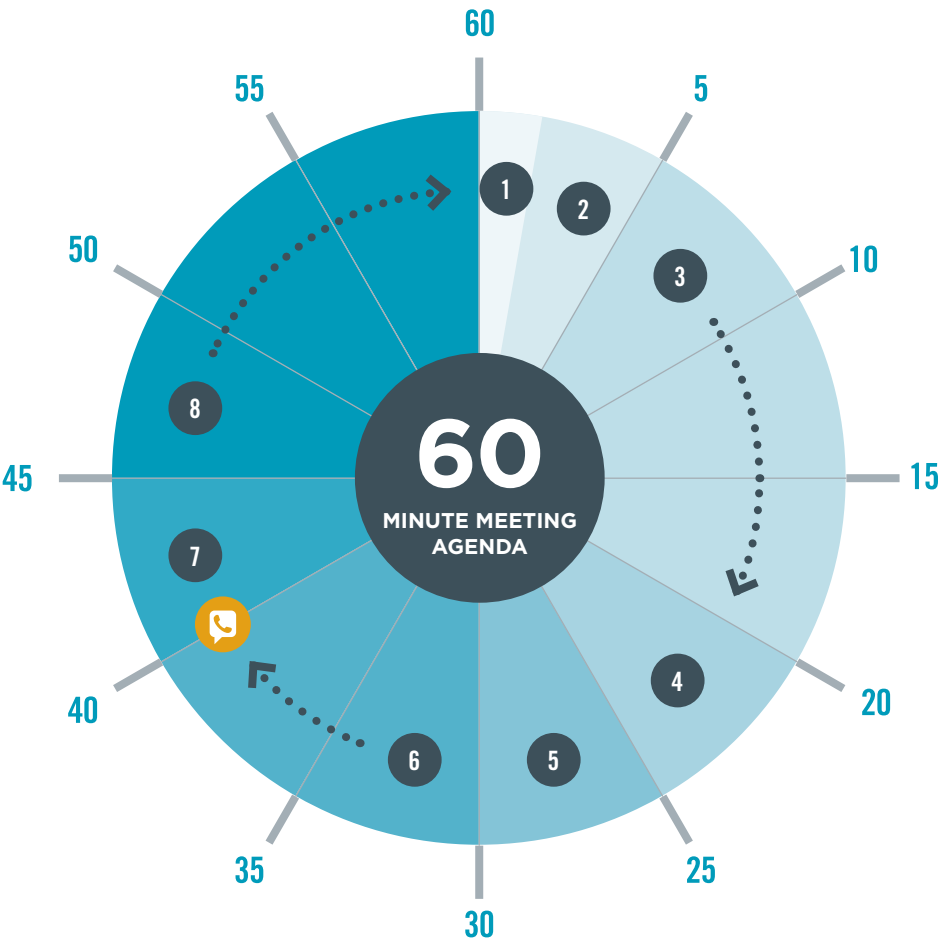
1 — 2 minutes

BUSINESS PROBLEM

Start at the beginning: clarify the business problem - for the manager's understanding, as well as for the rep's clarity.

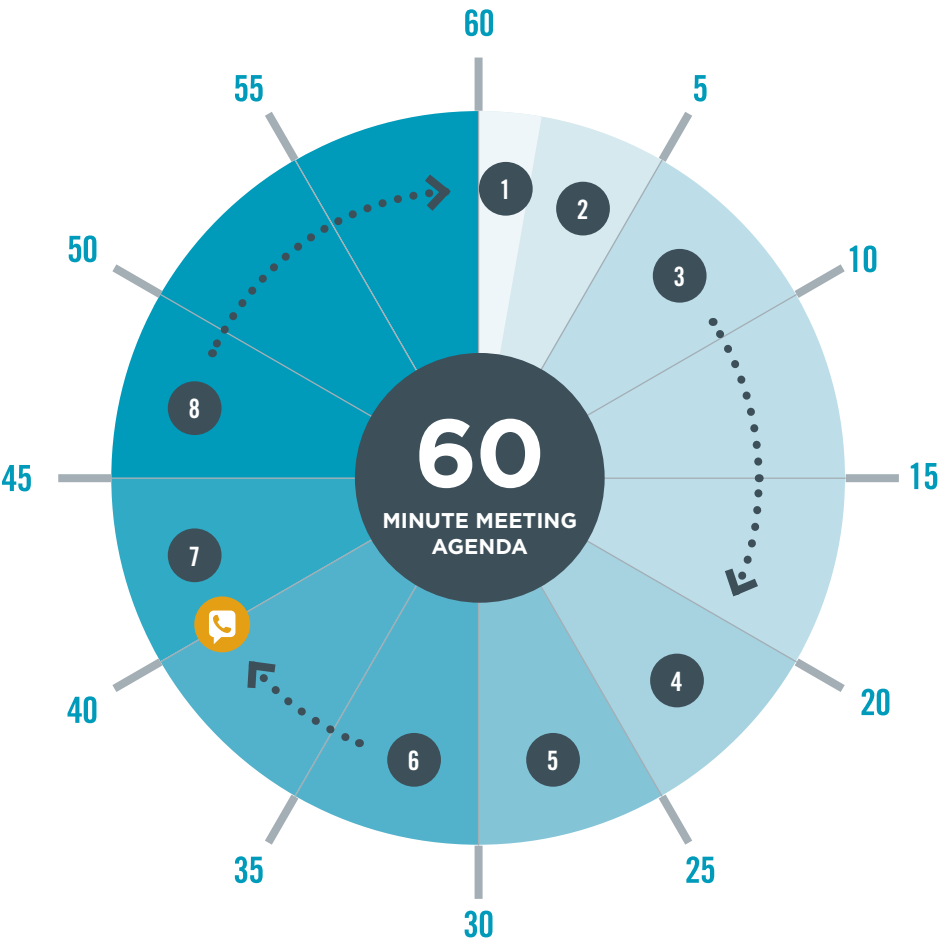### 2 — 3 minutes

CURRENT STATUS

The reason for reviewing the current status is to audit the steps that have been covered. What core disciplines of discovery have been overlooked? Which should come next?

3 — 15 minutes

OPPORTUNITY DETAILS

The rep should be able to start connecting the business need to solutions. Every opportunity detail should describe a way these two are linked.

DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | **Discipline 7** | Discipline 8 | Discipline 9

Ride-Along / Call-Along | Leader Application | Notes

4 — 5 minutes

ACTIONS COMPLETED

Finally, review the actions completed so far. What insights do they reveal? Use this data to refine the strategy for moving forward.
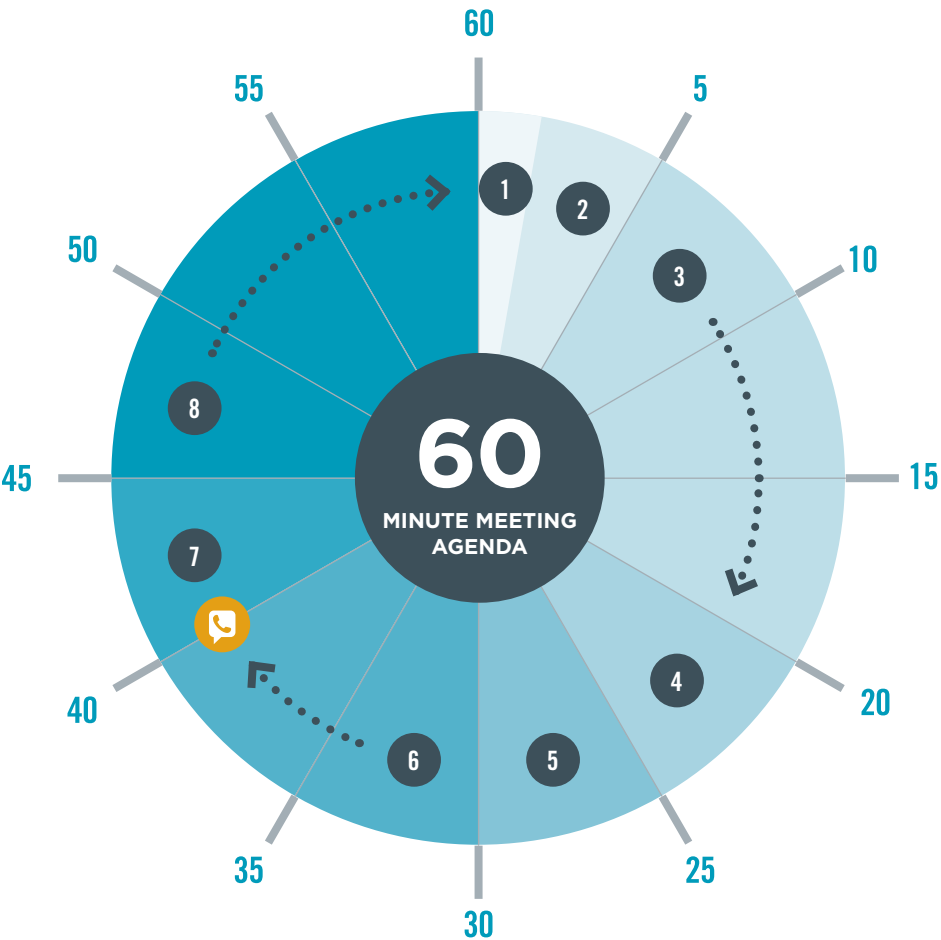
5 — 5 minutes

ACTIONS PENDING

Based on the actions completed - and what you've learned from them - what pending actions deserve the rep's focus.

6 — 10 minutes

MEETING GOALS & QUESTIONS

Help the rep clarify specific goals for the meeting. Challenge the rep using questions about any gaps you may see. The manager's primary goal should be to let the rep conduct the meeting.

DISCIPLINES | Discipline 1 Discipline 2 Discipline 3 Discipline 4 Discipline 5 Discipline 6 **Discipline 7** Discipline 8 Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

60 MINUTE MEETING AGENDA

60
55
50
45
40
35
30
25
20
15
10
5

1 2 3 4 5 6 7 8

CONDUCT SALES CALL

7 — 5 minutes

WHAT WORKED

Debrief immediately after the call. Begin by reviewing what worked. Reinforce the behaviors that are already developing.

8 — 15 minutes

IMPROVEMENT PLAN

Next, constructively identify techniques and behaviors that can be improved. There are no failures - only learning opportunities.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

1 BUSINESS PROBLEM

TIME TO COMPLETE ▶ **2 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

ACCOUNT NAME

MEETING PARTICIPANT NAMES AND TITLES

BUSINESS PROBLEM

2 CURRENT STATUS

TIME TO COMPLETE ▶ **3 MINUTES**

CURRENT STATUS

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

3   OPPORTUNITY DETAILS

TIME TO COMPLETE   **10 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

OPPORTUNITY	VALUE	CLOSE DATE	RISK
1			
2			
3			

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

4   ACTIONS COMPLETED

TIME TO COMPLETE   **5 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

ACTIONS COMPLETED BY US SINCE LAST MEETING	ACTIONS COMPLETED BY THEM SINCE LAST MEETING
1	
2	
3	

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

5 ACTIONS PENDING

TIME TO COMPLETE   **5 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

ACTIONS PENDING FROM US	ACTIONS PENDING FROM THEM
1	
2	
3	

DISCIPLINES

Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

6 MEETING GOALS & QUESTIONS

TIME TO COMPLETE ▸ **10 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

GOALS FOR THE MEETING	QUESTIONS TO ASK
1 SMART	1
2 SMART	2
3 SMART	3

DISCIPLINES | Discipline 1 Discipline 2 Discipline 3 Discipline 4 Discipline 5 Discipline 6 **Discipline 7** Discipline 8 Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

7 WHAT WORKED

TIME TO COMPLETE ▸ **5 MINUTES**   Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.
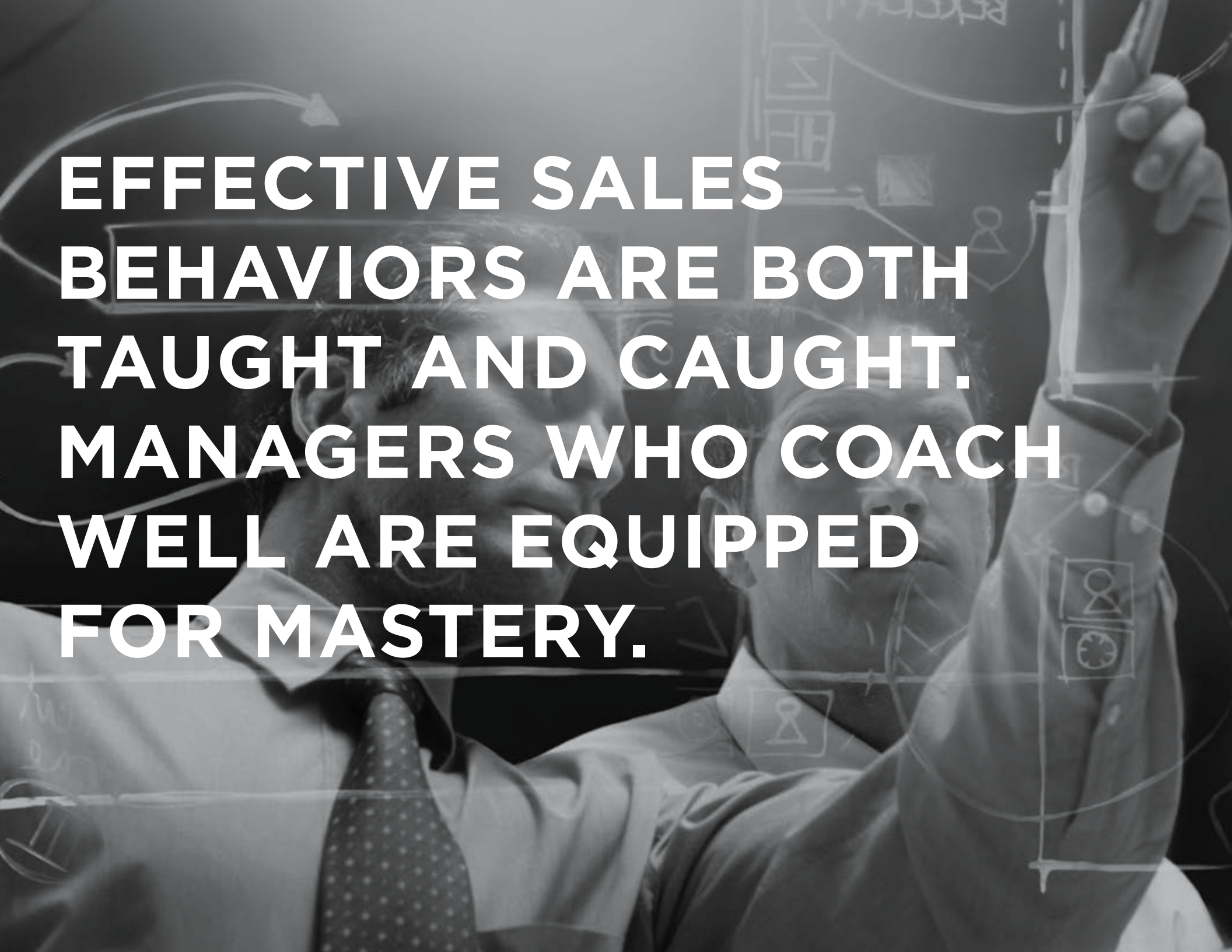
DEBRIEF AFTER THE CALL - WHAT WORKED
1
2
3

DISCIPLINES　　Discipline 1　　Discipline 2　　Discipline 3　　Discipline 4　　Discipline 5　　Discipline 6　　**Discipline 7**　　Discipline 8　　Discipline 9

Ride-Along / Call-Along　　　Leader Application　　　Notes

8 IMPROVEMENT PLAN

TIME TO COMPLETE ▸ **15 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

OPPORTUNITIES FOR IMPROVEMENT	NEXT STEPS
1	1
2	2
3	3

EFFECTIVE SALES BEHAVIORS ARE BOTH TAUGHT AND CAUGHT. MANAGERS WHO COACH WELL ARE EQUIPPED FOR MASTERY.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

MANAGING THE SALES MANAGERS:
The sales leader plays a key role too. These questions create a framework for the leader to follow.

LEADER APPLICATION
THE SALES LEADER'S ROLE:

DURING RIDE ALONG WEEK, SALES LEADERS SHOULD ASK
SALES MANAGERS:

1 **How many Ride Alongs did you complete?**

2 **How would you describe the call and what was the outcome?**

3 **What were the top three coaching opportunities?**

DISCIPLINES

Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

NOTES

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   **Discipline 7**   Discipline 8   Discipline 9

Ride-Along / Call-Along   Leader Application   Notes

NOTES

DISCIPLINE 8

MASTER 1:1 SALES MEETING

ONE-ON-ONE MEETING DURING WEEK 1 OF THE BUSINESS CYCLE

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   **Discipline 8**   Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

DISCIPLINE 8

MASTER 1:1 SALES MEETING

ONE-ON-ONE MEETING DURING WEEK 1 OF THE BUSINESS CYCLE

PURPOSE

INDIVIDUAL GOAL REVIEW AND ALIGNMENT TO IMPROVE SALES WITH TARGETED PERFORMANCE COACHING.

WHAT IT IS

What do reps want most? Coaching! Master 1:1 Sales Meetings are 60 to 90-minute meetings giving managers face-time with each rep to review progress, discuss strategies, set goals, praise successes, and teach from failures. These private reviews are focused on individual performance and initiatives.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   **Discipline 8**   Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

HOW TO DO IT

The Master 1:1 Sales Meeting is conducted with each rep, one-at-a-time, during the first week of the business cycle. This may mean monthly or quarterly. The format can be similar to the Master Sales Team Meeting, discussing Key Performance Indicators, open opportunities, wins, and personal goals. The dedicated time allows managers to develop professional rapport with the rep, and the private setting facilitates candid conversations for coaching on personal goals, opportunities for improvement, or significant challenges.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   **Discipline 8**   Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

90
MINUTE MEETING
AGENDA
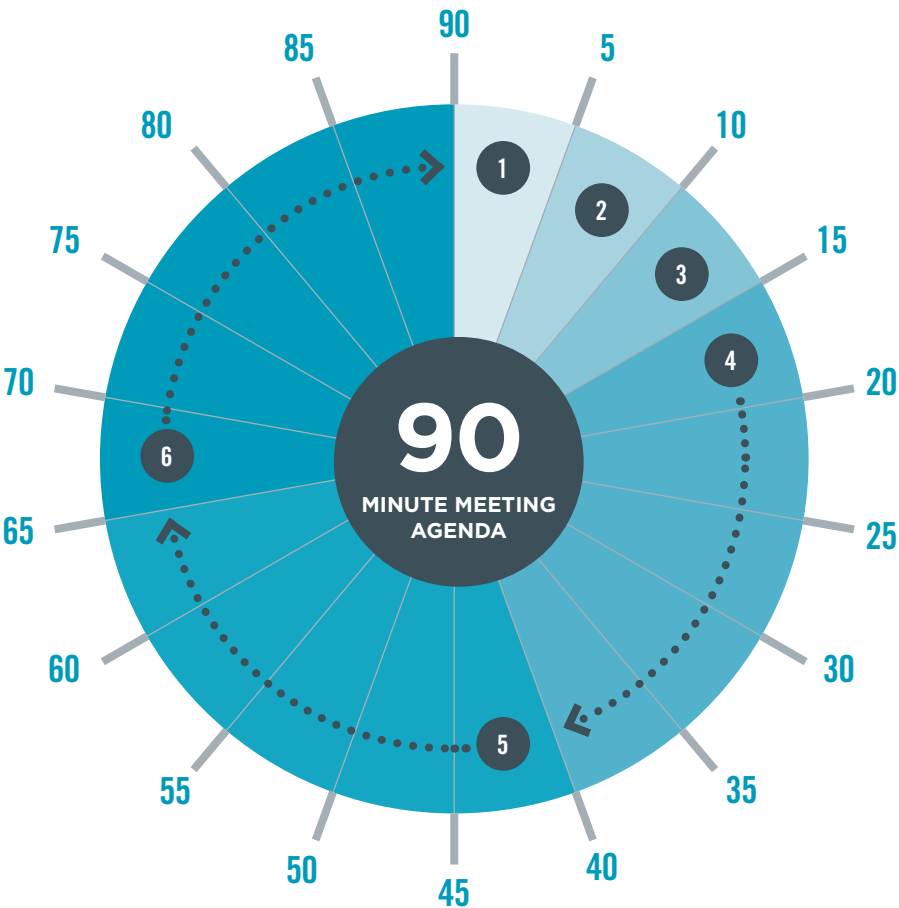
1   5 minutes

METRICS REVIEW

Behaviors are a means to an end. They must impact the measurable metrics. Level-set by making metrics the starting point.
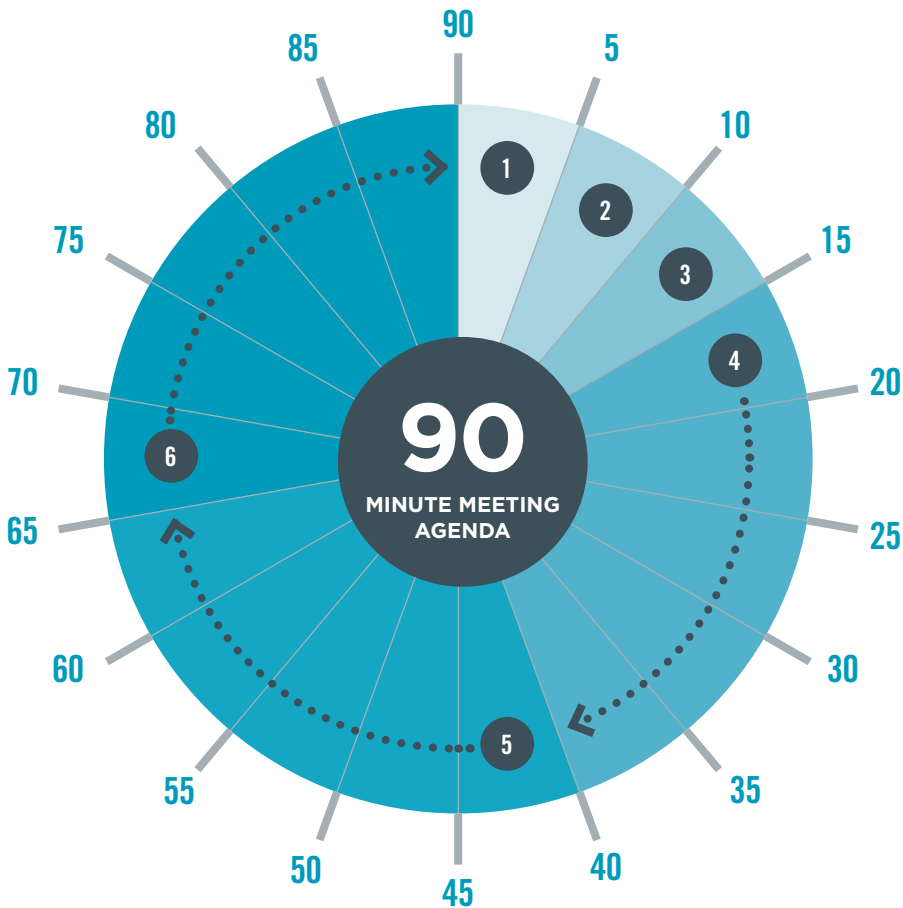
2   5 minutes

OPEN OPPORTUNITIES

LEADER BOARD

Make your one-on-one meetings a safe place for the rep. Improvement begins by embracing the current state, good or bad, then focusing on steps toward improvement.

3   5 minutes

WINS IN TOP 20 ACCOUNTS

Use wins to reinforce behavior. Don't just celebrate - make sure you celebrate behaviors. Especially the ones you intend to reinforce.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   **Discipline 8**   Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

90 MINUTE MEETING AGENDA

4 — 25 minutes
TOP 5 OPPORTUNITIES CURRENT PERIOD

Focus is the key to success. Use your management authority to give the rep permission to ignore certain "opportunities" in order to focus on the best ones.

5 — 25 minutes
TOP 5 OPPORTUNITIES NEXT PERIOD

An ounce of preparation now helps to set up the next cycle. This discipline ensures reps also keep their eyes on the horizon.

6 — 25 minutes
HIGH IMPACT PERSONAL GOALS

People operate according to expectations. Use high impact goals to help reps expect continuous improvement of themselves.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   **Discipline 8**   Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

1   METRICS REVIEW

TIME TO COMPLETE   **5 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

PTD % QUOTA

IN-PERIOD WINS

IN-PERIOD PIPELINE

IN-PERIOD GAP BASED ON X RATIO

OUT-PERIOD PIPELINE

OUT-PERIOD GAP BASED ON X RATIO

POTENTIAL UPSIDE FROM FUTURE PERIODS

DISCIPLINES | Discipline 1 Discipline 2 Discipline 3 Discipline 4 Discipline 5 Discipline 6 Discipline 7 **Discipline 8** Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

② OPEN OPPORTUNITIES LEADER BOARD

TIME TO COMPLETE ▶ **5 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

ACCOUNT NAME	OPPORTUNITY VALUE	ACCOUNT NAME	OPPORTUNITY VALUE
1		11	
2		12	
3		13	
4		14	
5		15	
6		16	
7		17	
8		18	
9		19	
10		20	

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   **Discipline 8**   Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

3   WINS IN TOP 20 ACCOUNTS

TIME TO COMPLETE | **5 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

ACCOUNT NAME	WIN VALUE	ACCOUNT NAME	WIN VALUE
1		11	
2		12	
3		13	
4		14	
5		15	
6		16	
7		17	
8		18	
9		19	
10		20	

DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | **Discipline 8** | Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

4 TOP 5 OPPORTUNITIES CURRENT PERIOD

TIME TO COMPLETE ▸ **25 MINUTES** **CURRENT PERIOD**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

OPPORTUNITY	ACCOUNT	STAGE	NEXT STEP	AMOUNT	CLOSE DATE	$ CHANGE	DATE CHANGE
1							
2							
3							
4							
5							

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   **Discipline 8**   Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

5   TOP 5 OPPORTUNITIES NEXT PERIOD

TIME TO COMPLETE   **25 MINUTES**   **NEXT PERIOD**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

OPPORTUNITY	ACCOUNT	STAGE	NEXT STEP	AMOUNT	CLOSE DATE	$ CHANGE	DATE CHANGE
1							
2							
3							
4							
5							

DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | **Discipline 8** | Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

6   HIGH IMPACT PERSONAL GOALS

TIME TO COMPLETE ▶ **25 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

GOAL 1	
SPECIFIC	
MEASURABLE	
ACTIONABLE	
REALISTIC	
TIME SPECIFIC	

GOAL 2	
S	
M	
A	
R	
T	

GOAL 3	
S	
M	
A	
R	
T	

GOAL 4	
S	
M	
A	
R	
T	

PERSONAL GOALS	
S	
M	
A	
R	
T	

DISCIPLINES | Discipline 1 Discipline 2 Discipline 3 Discipline 4 Discipline 5 Discipline 6 Discipline 7 **Discipline 8** Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

MANAGING THE SALES MANAGERS:
The sales leader plays a key role too. These questions create a framework for the leader to follow.

LEADER APPLICATION
THE SALES LEADER'S ROLE:

DURING MASTER 1:1 SALES MEETING WEEK, SALES LEADERS
SHOULD PICK ONE OF THE MANAGER'S REPS AND ASK:

1 What is the rep's quota attainment and pipeline-to-quota ratio compared to target?

2 What obstacles does the rep face to win the Top 5 opportunities?

3 What progress is the rep making toward the attainment of the 5 non-revenue goals?

DISCIPLINES

Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   **Discipline 8**   Discipline 9

Master 1:1 Sales Meeting   Leader Application   Notes

NOTES

DISCIPLINE 9

EXECUTIVE ROLL-UP MEETING

MANAGERS REPORT UP TO LEADERSHIP

DISCIPLINES | Discipline 1　Discipline 2　Discipline 3　Discipline 4　Discipline 5　Discipline 6　Discipline 7　Discipline 8　**Discipline 9**

Executive Roll-Up Meeting　　Leader Application　　Notes

DISCIPLINE 9

EXECUTIVE ROLL-UP MEETING

MANAGERS REPORT UP TO LEADERSHIP

PURPOSE　TO KEEP SALES LEADERS INFORMED OF TEAM ACTIVITY OR MARKET CHANGES THAT CAN IMPACT THE CORPORATE FORECAST AND TO DISCUSS BOTTLENECKS THAT NEED TO BE CLEARED.

WHAT IT IS　Alignment is critical! Executive Roll-Up Meetings are periodic meetings between managers and leadership. They provide essential structure to help managers stay on track. By reporting the in-period forecast and next-period pipeline, managers hold themselves accountable to sales leadership and vice-versa.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

HOW TO DO IT

Executive Roll-Up Meeting are the primary forum between managers and leadership. They enable a regular interchange to manage the managers - praising success, asking tough questions, and identifying opportunities for improvement. They also help to circulate vital information for proper resource planning and allocation. Managers use data from the Pipeline 1:1 Meeting and Forecast 1:1 meetings to ensure pre-populated CRM views are accurate. Ideally, this information lives in the cloud and is accessible any time anywhere from your CRM system. The frequency and timing of these meetings can vary. Create a predictable routine with a cadence that produces the best results based on your sales cycle.

PERFORMANCE HAPPENS WHEN THE ORGANIZATION IS ALIGNED AROUND A UNIFIED SYSTEM, FROM TOP TO BOTTOM.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

MANAGING UP: FORECAST ROLL-UP

60
MINUTE MEETING
AGENDA
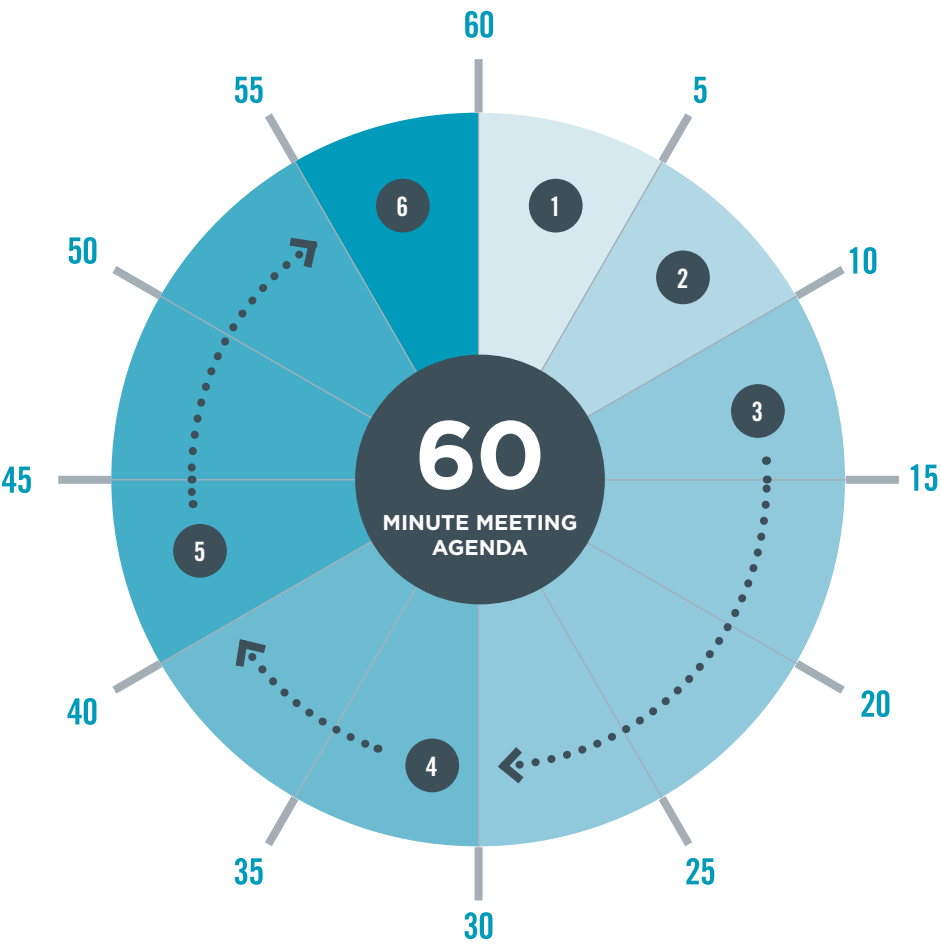
1
5 minutes
TARGET DETAILS

Review the target. Compare it to actual and the change since last report.

2
5 minutes
GAP REVIEW

Review the progress toward the quota and give details around the gap. What are the strategies for closing the gap?

3
20 minutes
FORECAST FOR

REPORTING PERIOD

Based on the quota, gap, commits, and potential upsides - as well as the strategy for closing the gap - provide the updated forecast for the period.

DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | **Discipline 9**

Executive Roll-Up Meeting | Leader Application | Notes

MANAGING UP: FORECAST ROLL-UP
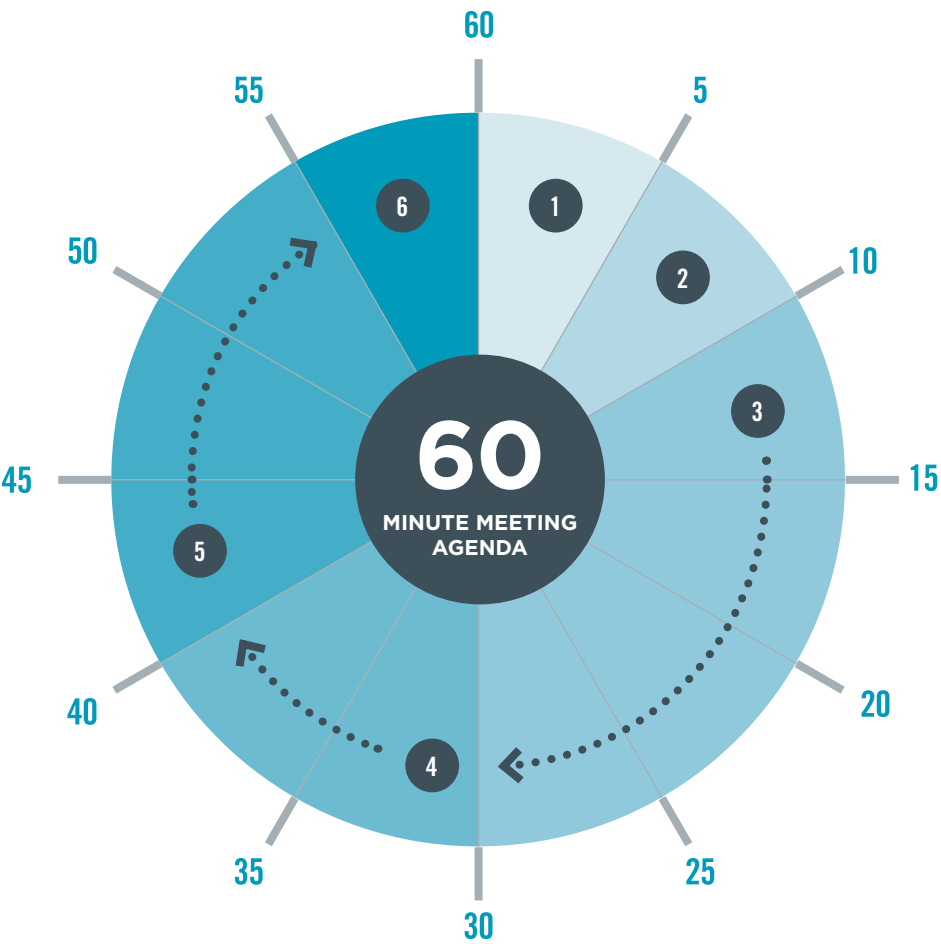
4 — 10 minutes
POTENTIAL UPSIDES

Review those opportunities with the potential for advancement into the forecast.

5 — 15 minutes
FOCUS QUESTIONS

The leader asks the manager these questions (found on pages 154-155).

6 — 5 minutes
NEXT STEPS

Determine the action steps that the manager will take as a result of this meeting, and prior to the next meeting.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

1   TARGET DETAILS

TIME TO COMPLETE   **5 MINUTES**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.
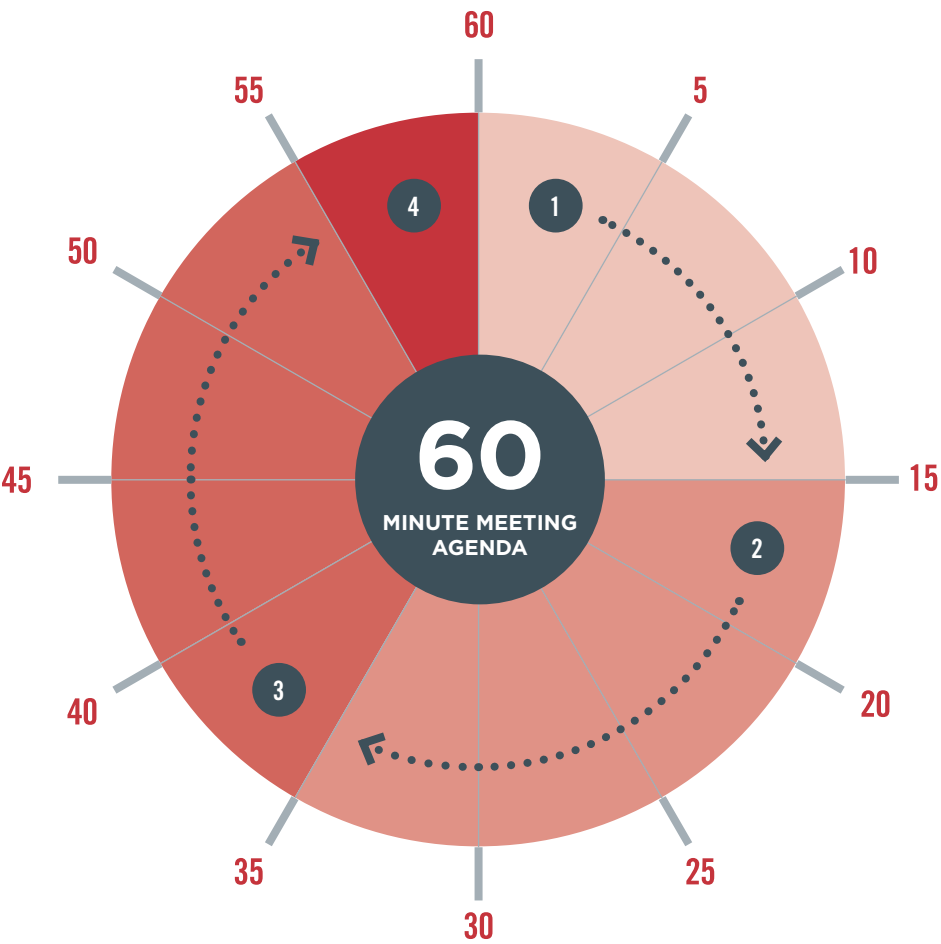
QUESTIONS SALES LEADERS SHOULD ASK

IN-PERIOD TARGET	
ACTUAL	
ACTUAL CHANGE SINCE LAST REPORT	What can you tell me about this change?

2   GAP REVIEW

TIME TO COMPLETE   **5 MINUTES**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

QUESTIONS SALES LEADERS SHOULD ASK

GAP TO TARGET	
GAP CHANGE SINCE LAST REPORT	What can you tell me about this change?

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

3   FORECAST FOR REPORTING PERIOD

TIME TO COMPLETE   **20 MINUTES**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

QUESTIONS SALES LEADERS SHOULD ASK

FORECAST FOR REPORTING PERIOD

1. What can you tell me about this change?
2. Pick 2-3 opportunities. Ask them to describe the status and next steps
3. If not at quota, ask for a gap plan

4   POTENTIAL UPSIDES

TIME TO COMPLETE   **10 MINUTES**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

QUESTIONS SALES LEADERS SHOULD ASK

POTENTIAL UPSIDE

Pick 2-3 upside opportunities. Ask them to describe the status and next steps

POTENTIAL UPSIDE CHANGE SINCE LAST REPORT

What can you tell me about this change?

DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | **Discipline 9**

Executive Roll-Up Meeting | Leader Application | Notes

5 FOCUS QUESTIONS

TIME TO COMPLETE ▸ **15 MINUTES**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

QUESTIONS SALES LEADERS SHOULD ASK

FOCUS QUESTIONS

found on pages 154-155

6 NEXT STEPS

TIME TO COMPLETE ▸ **5 MINUTES**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

QUESTIONS SALES LEADERS SHOULD ASK

NEXT STEPS

DISCIPLINES | Discipline 1 Discipline 2 Discipline 3 Discipline 4 Discipline 5 Discipline 6 Discipline 7 Discipline 8 **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

NOTES

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

MANAGING UP: PIPELINE ROLL-UP

1   15 minutes

PIPELINE OVERVIEW

Similar to the forecast overview, the sales manager reports the state of the pipeline to the leader, giving context for seasonality, competitive landscape, growth curve, etc.

2   20 minutes

PIPELINE CHANGE DETAILS

Next, the sales manager reports the significant changes since the last meeting. Details may include trends, causality, and current strategies.

3   20 minutes

FOCUS QUESTIONS

The leader can ask the sales manager these questions (found on pages 154-155).

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

MANAGING UP: PIPELINE ROLL-UP
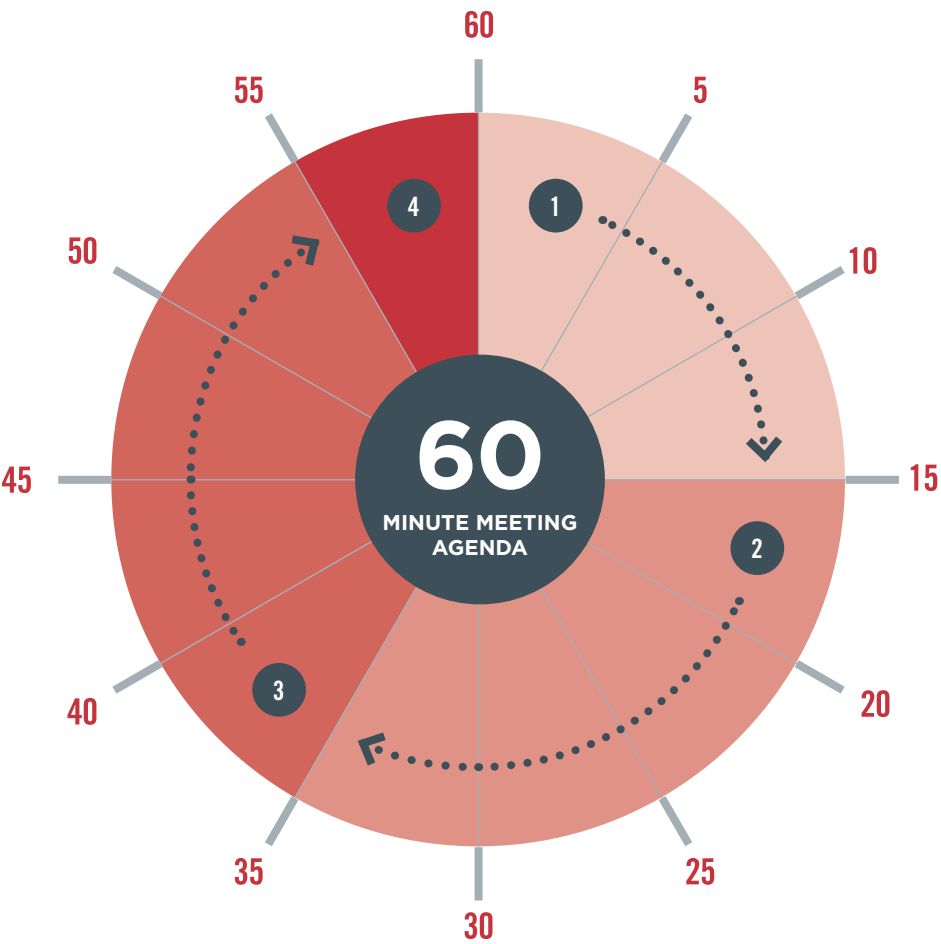
4 — 15 minutes

NEXT STEPS

Summarize the sales manager's next steps based on this meeting. Make sure these include behavioral goals, not just outcome goals.

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

1   PIPELINE OVERVIEW

TIME TO COMPLETE   **5 MINUTES**

Use this template as you create your unique plan. Be sure to enter the data in your CRM system.

QUESTIONS SALES LEADERS SHOULD ASK

OUT-PERIOD PIPELINE TARGET	
ACTUAL PIPELINE	
ACTUAL CHANGE SINCE LAST REPORT	What can you tell me about this change?
GAP TO TARGET	
GAP CHANGE SINCE LAST REPORT	What can you tell me about this change?

DISCIPLINES | Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

2   PIPELINE CHANGE DETAILS

TIME TO COMPLETE ▸ **20 MINUTES**

Use this template as you create your unique plan.
Be sure to enter the data in your CRM system.

TOP 10 OUT-PERIOD OPPS	VALUE	$ CHANGE	DATE CHANGE
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

3 FOCUS QUESTIONS

TIME TO COMPLETE ▶ 20 MINUTES   Use this template as you create your unique plan. Be sure to enter the data in your CRM system.   **QUESTIONS SALES LEADERS SHOULD ASK**

FOCUS QUESTIONS   found on pages 154-155

4 NEXT STEPS

TIME TO COMPLETE ▶ 5 MINUTES   Use this template as you create your unique plan. Be sure to enter the data in your CRM system.   **QUESTIONS SALES LEADERS SHOULD ASK**

NEXT STEPS

DISCIPLINES   Discipline 1   Discipline 2   Discipline 3   Discipline 4   Discipline 5   Discipline 6   Discipline 7   Discipline 8   **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

NOTES

DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | **Discipline 9**

Executive Roll-Up Meeting   Leader Application   Notes

MANAGING THE SALES MANAGERS:
The sales leader plays a key role too. These questions create a framework for the leader to follow.

LEADER APPLICATION
THE SALES LEADER'S ROLE:

SALES LEADER DIAGNOSTIC QUESTIONS:

1 PIPELINE UPDATE MEETING

1. How many opportunities are there with overdue dates or no activity for more than X days?
2. Which opportunities have "pushed" more than three times and why?
3. How many Sales Makers have pipeline less than X of quota?

2 MASTER SALES TEAM MEETING

1. How is the team performing compared to target?
2. What are the top 5 current and next period opportunities you discussed and what were the key takeaways?
3. What are the non-revenue team goals you established or reviewed?

3 LEARNING HUDDLES

1. What was the Huddle focus and who was the presenter?
2. What were the top three takeaways from the huddle?
3. What huddle topics are you considering for your next huddle?

DISCIPLINES | Discipline 1 | Discipline 2 | Discipline 3 | Discipline 4 | Discipline 5 | Discipline 6 | Discipline 7 | Discipline 8 | **Discipline 9**

Executive Roll-Up Meeting | Leader Application | Notes

4 **DAILY RESULTS CALL**

1. What did your team close yesterday?
2. What is the forecast now and what changed?
3. What is the upside?

5 **FORECAST 1:1 MEETING**

1. What is the forecast for the current period?
2. Accuracy of the forecast from last report?
3. What changed and why?

6 **PIPELINE 1:1 MEETING**

1. What is the team pipeline to quota ratio?
2. Who has the lowest pipeline to quota ratio?
3. What changed since the last report and why?

7 **RIDE ALONG**

1. How many ride alongs did you complete?
2. What were the top three "a-has"?
3. What were the top three coaching opportunities?

8 **MASTER 1:1 SALES MEETING**

1. What is his/her quota attainment and pipeline to quota ratio compared to target?
2. What obstacles does he/she face to win their top 5 opportunities?
3. What progress are they making toward the attainment of their 5 non-revenue goals?

DISCIPLINES Discipline 1 Discipline 2 Discipline 3 Discipline 4 Discipline 5 Discipline 6 Discipline 7 Discipline 8 **Discipline 9**

Executive Roll-Up Meeting Leader Application Notes

NOTES

BUILDING YOUR WINNING FORMULA

___

"WHEN PLANNING FOR A YEAR, PLANT CORN. WHEN PLANNING FOR A DECADE, PLANT TREES. WHEN PLANNING FOR LIFE, TRAIN AND EDUCATE PEOPLE."

- CHINESE PROVERB

BUILDING YOUR WINNING FORMULA

Doing the right thing at the right time, and doing it in the right sequence and tempo is critical if you're going to produce consistent results. Our research and experience have shown very simple and specific patterns that create powerful breakthroughs within organizations.

But every organization is different. It's up to you to adapt the sequence and timing of these disciplines to your own unique situation. How you arrange the **Quantity, Duration, Frequency and Sequence** of each discipline will determine your own unique **winning formula**. Winning formulas are influenced by management expectations, philosophy, climate and business cycle. For example, a company that expects a manager to coach 20% of the time in a high-growth environment will have a very different formula from one that expects managers to coach 70% of the time.

Ultimately, finding your pathway to growth is about maximizing people – their talents, abilities, and motivational triggers. Too often, sales leaders try to influence reps using only the techniques the leader responds to, instead of something

uniquely designed for the needs and style of the rep. This approach is near-sighted. **To influence other people, you've got to understand what already influences them.** To move other people, you've got to know what moves them. The concepts in this book are built on that thinking. In the study of Neural Linguistics, we call some of these patterns Meta Programs. While the focus of this book has not been about individual tools of influence, great sales leaders know there are pathways to persuasion as much as there are systems for success. As a result, we're including in this book a bonus chapter, pulled from Tony Robbins' original work *Unlimited Power*. This bonus chapter will introduce you to a few of the simple patterns that shape and control how different people perceive, learn, and are influenced.

When you understand the right pattern - the right pathway - and you present information *in* that pathway, it becomes more irresistible.

If you're interested in any of the services we offer at Cloud Coaching International, we'd be happy to help your company. Our focus is leveraging resources and opportunities to help you maximize your top line revenues through high performance sales solutions. It's a privilege to serve you, and we hope to have the opportunity to meet and work with you and your team sometime soon.

Once again, we hope you found great value in this workbook. If

you did, any contribution you would like to make – of $10 to $100 or more - to the UCSF Benioff Children's Hospital would be deeply appreciated. Thank you for being our partner in touching childrens' lives. The web site is below and there is additional donation information is on the inside cover.

We hope that this will be only the beginning of your uncovering many new pathways to growth!

Tony Robbins and Walter Rogers

To donate, visit:

www.ilovebenioffkids.org

QUANTITY, DURATION, FREQUENCY AND SEQUENCE

THERE ARE FOUR COMPONENTS TO CREATING A WINNING FORMULA:

QUANTITY	DURATION	FREQUENCY	SEQUENCE
The number of times each action should be completed within a specific time period	The amount of time spent to complete each action	The predictable and repeatable schedule for each action	The order in which each of the actions are taken

SOME OF THE INGREDIENTS ARE FOCUSED ON THE TEAM AS A UNIT, SOME WITH INDIVIDUAL TEAM MEMBERS IN A 1:1 SETTING, AND SOME FOR LEADERSHIP.

INGREDIENT	WITH TEAM	1:1	MANAGING UP	APROX. TIME
SPRING CLEANING	✓			60 minutes
MASTER SALES TEAM MEETING	✓			90 minutes
TEAM HUDDLE	✓			60 minutes
DAILY RESULTS CALL	✓			60 minutes
FORECAST 1:1		✓		45 minutes (per rep)
PIPELINE 1:1		✓		45 minutes (per rep)
RIDE ALONG		✓		65 minutes (per rep)
MASTER 1:1 SALES MEETINGS		✓		90 minutes (per rep)
EXECUTIVE ROLL-UP MEETING			✓	60 minutes

SAMPLE 13-WEEK CADENCE

WEEK 1	**WEEK 2**	**WEEK 3**	**WEEK 4**
Pipeline Update Meeting	Learning Huddles	Learning Huddles	Learning Huddles
Master Sales Team Meeting	Pipeline 1:1 Meeting	Forecast 1:1 Meeting	Pipeline 1:1 Meeting
Master 1:1 Sales Meeting	Ride Along/Call Along	Ride Along/Call Along	Pipeline Roll-up Meeting
Executive Roll-up Meeting	Pipeline Roll-up Meeting	Forecast Roll-up Meeting	
WEEK 5	**WEEK 6**	**WEEK 7**	**WEEK 8**
Pipeline Update Meeting	Learning Huddles	Learning Huddles	Learning Huddles
Master Sales Team Meeting	Pipeline 1:1 Meeting	Forecast 1:1 Meeting	Pipeline 1:1 Meeting
Master 1:1 Sales Meeting	Ride Along/Call Along	Ride Along/Call Along	Pipeline Roll-up Meeting
Executive Roll-up Meeting	Pipeline Roll-up Meeting	Forecast Roll-up Meeting	
WEEK 9	**WEEK 10**	**WEEK 11**	**WEEK 12**
Pipeline Update Meeting	Learning Huddles	Learning Huddles	Daily Results Call
Master Sales Team Meeting	Ride Along/Call Along	Pipeline Roll-up Meeting	Forecast 1:1 Meeting
Master 1:1 Sales Meeting	Forecast 1:1 Meeting		
Executive Roll-up Meeting			

WEEK 13	
Daily Results Call	**REPEAT, STARTING AT WEEK 1.**
Forecast 1:1 Meeting	

NOTES

ABOUT
THE AUTHORS

TONY ROBBINS

During the last 35 years, Tony Robbins has had the unique opportunity of working with four million people from more than 100 countries. Robbins' journey began with the desire to help individuals transform the quality of life, but most recently he's had a unique specialization in transforming key impact areas for businesses worldwide. Marc Benioff, CEO of salesforce.com, recently stated publically, "Tony Robbins and his strategies and tools, have been at the core of our culture from the beginning. He has been one of the critical keys to salesforce.com's leadership in cloud computing and its growth into a 3 billion dollar company." Robbins has been honored by Accenture as one of the "Top 50 Business Intellectuals in the World"; by Harvard Business Press as one of the "Top 200

Business Gurus"; by American Express as one of the "Top Six Business Leaders in the World" to coach its entrepreneurial clients. He is a corporate Vice Chairman, and Chairman overseeing five private companies.

As an advisor to leaders around the world, Robbins' is a recognized authority on the psychology of leadership, negotiations, organizational turnaround, and peak performance. Leaders call on him from every walk of life—presidents,

political leaders, advocates for humanity, CEOs of multinational corporations, psychologists, peak performance athletes, world-class entertainers, teachers, and parents. His nonprofit Anthony Robbins Foundation provides assistance to inner-city youth, senior citizens, and the homeless, and feeds more than two million people in 56 countries every year through its international holiday "Basket Brigade." Robbins has directly impacted the lives of more than 50 million people from over 100 countries with his best-

selling books, multimedia and health products, public speaking engagements, and live events.

WALTER ROGERS

Walter Rogers is CEO of CloudCoaching International and Baker Communications. He has created and led businesses in 13 countries on 3 continents, has been interviewed on over 100 shows on CNN, CBS and ABC on the topics of Sales, CRM, Sales Management and Corporate Productivity, is on the Advisory Board of DePaul University Center for Sales Leadership and was a Texas eCommerce Awards finalist for two consecutive years. His passion for CRM enabled sales performance transformation inspired him to write SPARK!, a book focused on 11 best practices that can massively accelerate corporate growth by turning a company's CRM into a corporate nervous system. He is currently working with Tony Robbins and other experts on a new book focused on how to institutionalize technology enabled

high performance leadership and management behaviors.

Prior to his current role, he self-funded, led and created highly profitable exit strategies for two leading edge software companies; Asset Optimization Group, a capacity planning software company which was acquired by VMware (NYSE: VMW) in 2003 and CertiSource, a transaction management software company which was acquired by (NASDAQ: VERT) in 1999. Prior to founding his first company, he was Vice President of Asia Pacific Marketing for Marcam, a leading process ERP Software Company. In his role at Marcam he was responsible for all marketing and channel development initiatives in 11 countries ranging from Korea to Australia. Prior to his role at Marcam, he founded and led Market Solutions Group, a consultancy specializing in the development of integrated marketing strategies.

Mr. Rogers is a graduate of the University of Texas in Austin.

EXPERIENCE THE POWER
OF COACHING IN THE CLOUD

**High-Performance
Sales Solutions**

Coaching in the Cloud is proud to serve some of the world's most recognizable brands and companies, in over twenty countries, delivered in over ten languages.

Sustainable change in an organization does not come from a single event, such as user-training. Long-term transformation comes from impacting an organization consistently over time.

Coaching in the Cloud is a dynamic cloud-based service that systematically delivers targeted results using real customers in your pipeline. This allows team members to directly apply feedback and best practices to live customer situations. One-hour weekly "burst sessions" delivered 100% in the cloud, enable you to rapidly deploy highly customized and massively scalable Sales Performance Improvement

strategies and tactics that sustain and ignite growth.

These proven strategies and tactics are derived from modeling the most successful businesses and the strategies that produce consistent results combined with over thirty years of experience from entrepreneur, author and peak performance strategist, Anthony Robbins. They are designed to help break through an organization's barriers while implementing real tools to maximize your bottom line.

If you are ready to increase your sales, marketing and service effectiveness, while unlocking your CRM investment, call 1.877.253.8506 for a free consultation.

Coaching in the Cloud is a dynamic award winning cloud-based behavioral integration service that systematically combines winning CRM behaviors while delivering targeted sales results, sustainable growth, and measurable ROI into the DNA of your organization. Sales behavior and performance modeling are integrated and aligned with weekly disciplined selling activity, optimized sales processes and weekly result huddles that ensure rapid and sustainable sales performance improvement.

Create sales breakthroughs today.

NOTES

UNLIMITED POWER

CHAPTER 14
DISTINCTIONS OF EXCELLENCE: METAPROGRAMS

——

The following sample chapter is excerpted from Tony Robbins' bestseller *Unlimited Power*.

UNLIMITED POWER

CHAPTER 14 - DISTINCTIONS OF EXCELLENCE: METAPROGRAMS

"IN THE RIGHT KEY ONE CAN SAY ANYTHING. IN THE WRONG KEY, NOTHING: THE ONLY DELICATE PART IS THE ESTABLISHMENT OF THE KEY."
- George Bernard Shaw

One of the best ways to become aware of the astonishing diversity of human reactions is to speak to a group of people. You can't help noticing how differently people react to the same thing. You tell what you consider to be an inspiring story, and one person will be transfixed, another bored to tears. You tell a joke, and one person howls while another doesn't move a muscle. You'd think each person was listening in a different mental language.

The question is why people react so differently to identical messages. Why does one person see the glass as half-empty and another see it as half-full? Why does one person hear a message and feel energized, excited and motivated while another hears the exact same message and doesn't respond at all? Shaw's quote is precisely right. If you address someone in the right key, you can do anything. If you address him in the wrong one, you can do nothing. The most inspiring message, the most insightful thought, the most intelligent critique, are absolutely meaningless unless they're understood both intellectually and emotionally by the person to whom

UNLIMITED POWER

CHAPTER 14 - DISTINCTIONS OF EXCELLENCE: METAPROGRAMS

they're being addressed. They're major keys not just to personal power, but to many of the broader issues we must confront collectively. If you want to be a master persuader, a master communicator, in both business and in personal life, you have to know how to find the right key.

The path is through metaprograms. Metaprograms are the keys to the way a person processes information. They're powerful internal patterns that help determine how he forms his internal representations and directs his behavior. Metaprograms are the internal programs (or sorts) we use in deciding what to pay attention to. We distort, delete, and generalize information because the conscious mind can only pay attention to so many pieces of information at any given time.

Our brain processes information much the way a computer does. It takes fantastic amounts of data and organizes them into a configuration that makes sense to that person. A computer can't do anything without software, which provides the structure to perform specific tasks. Metaprograms operate much the same way in our brain. They provide the structure that governs what we pay attention to, how we make sense of our experiences, and the directions in which they can take us. They provide the basis on which we decide that something is interesting or dull, a potential blessing or a potential threat. To communicate with a computer, you have to understand its software. To communicate effectively with a person, you have to understand his metaprograms.

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People have patterns of behavior, and they have patterns by which they organize their experience to create those behaviors. Only through understanding those mental patterns can you expect to get your message across, whether it's trying to get someone to buy a car or understand that you really love him/her. Even though the situations may vary, there is a consistent structure to how people understand things and organize their thinking.

The first metaprogram involves moving toward something or moving away. All human behavior revolves around the urge to gain pleasure or avoid pain. You pull away from a lighted match in order to avoid the pain of burning your hand. You sit and watch a beautiful sunset because you get pleasure from the glorious celestial show as day glides into night.

The same is true of more ambiguous actions. One person may walk a mile to work because he enjoys the exercise. Another may walk because he has a terrible phobia about being in a car. One person may read Faulkner, Hemingway, or Fitzgerald because he enjoys their prose and insight. Another might read the same

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writers because he doesn't want people to think of him as an uneducated dunce. He's not so much seeking pleasure as avoiding pain; he's moving away from something, not toward it.

As with the other metaprograms I'll discuss, this process is not one of absolutes. Everyone moves toward some things and away from others. No one responds the same way to each and every stimulus, although everyone has a dominant mode, a strong tendency toward one program or another. Some people tend to be energetic, curious risk takers. They may feel most comfortable moving toward something that excites them. Others tend to be cautious, wary, and protective; they see the world as a more perilous place. They tend to take actions away from harmful or threatening

things rather than toward exciting ones. To find out which way people move, *ask them what they want in a relationship—a house, car, job or anything else*. Do they tell you what they want or what they don't want?

What does this information mean? Everything. If you're a businessman selling a product, you can promote it in two ways, by what it does or by what it doesn't do. You can try to sell cars by stressing that they're fast, sleek, or sexy, or you can emphasize that they don't use much gas, don't cost much to maintain, and are particularly safe in crashes. The strategy you use should depend entirely upon the strategy of the person you're dealing with. Use the wrong metaprograms with a person, and you might as well have stayed home. You're trying to move him toward

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something, and all he wants is to find a good reason to back away.

Remember, a car can travel along the same path in forward or reverse. It just depends on what direction it's facing. The same is true on a personal basis. Let's say you want your child to spend more time on his schoolwork. You might tell him, "You better study or you won't get into a good college." Or, "Look at Fred. He didn't study, so he flunked out of school, and he's going to spend the rest of his life pumping gas. Is that they kind of life you want for yourself?" How well will that strategy work? It depends on your child. If he's primarily motivated by moving away, it might work well. But what if he moves towards things? What if he's motivated by things that excite him, by moving towards

things he finds appealing? If that's how he responds, you're not going to change his behavior by offering the exampling of something to move away from. You can nag until you're blue in the face, but you're talking in the wrong key. You're talking Latin and the kid understands Greek. You're wasting your time, and you're wasting his. In fact, people who move toward are often angered or resentful of those who present things to be moved away from. You would motivate your child better by saying, "If you do this, you can pick and choose any college you want to."

The second metaprogram deals with external and internal frames of reference. Ask someone else how he knows when he's done a good job. For some people, the proof comes from outside. The boss pats

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you on the back and says your work was great. You get a raise. You win a big award. Your work is noticed and applauded by your peers. When you get that sort of external approval, you know your work is good. That's an external frame of reference.

For others, the proof comes from inside. They "just know inside" when they've done well. If you have an internal frame of reference, you can design a building that wins all sorts of architectural awards, but if you don't feel it's special, no amount of outside approval will convince you it is. Conversely, you might do a job that gets lukewarm reception from your boss or peers, but if you feel that it's good work, you'll trust your own instincts rather than theirs. That's an internal frame of reference.

Let's say you're trying to convince someone to attend a seminar. You might say, "You've got to attend this seminar. It's great. I've gone and all my friends have gone, and they've all had a terrific time and raved about it for days. They all said it changed their lives for the better." If the person you're talking to has an external frame of reference, chances are you'll convince him. If all those people say it's true, he'll often assume it's probably true.

But what if he has an internal frame of reference? You'll have a difficult time convincing him by telling him what others have said. It doesn't mean anything to him. It doesn't compute. You can only convince him by appealing to things he knows himself. What if you told him, "Remember the series of lectures you went

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to last year? Remember how you said it was the most insightful experience you'd had in years? Well, I know about something that's maybe like that; I think if you check it out, you may find you'll have the same kind of experience. What do you think?" Will that work? Sure it will, because you're talking to him in his language.

It's important to note that all these metaprograms are *context- and stress-related.* If you've done something for ten or fifteen years, you probably have a strong internal frame of reference; if you're brand new, you may not have as strong an internal frame of reference about what is right or wrong in that context. So you tend to develop preferences and patterns over time. But even if you're right-handed, you still use your left hand in various situations where it is useful to do so.

The same is true of metaprograms. You're not just one way. You can vary. You can change.

What kind of frame of reference do most leaders have—internal or external? A truly effective leader has to have a strong internal frame. He wouldn't be much of a leader if he spent all his time asking people what they thought of something before he took any action. And, as with metaprograms, there's an ideal balance to be struck. Remember, few people operate strictly at one extreme. A truly effective leader has to be able to take in information effectively from the outside as well. When he doesn't, leadership becomes megalomania.

After one of my recent seminars open to guests, a man came up with three friends and sternly told me, "I'm not sold!" He was doing everything he could to egg

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me on. It quickly became obvious he was sorting by an internal frame of reference. (Externally oriented people rarely come up and just tell you what you should do and how you should do it.) And from his conversation with his friends, it also became clear they he moved away from things. So I told him, "I can't convince you to do anything. You're the only one who can convince you." He didn't know how to handle this response. He was waiting for me to strut my stuff and have him reject it. Now he had to agree with what I said, because he knew it was true inside. Then I said, "You're the only person who knows who would lose if you didn't attend the course." Normally such a remark would have sounded terrible to me. But I was speaking in his language, and it worked. Notice, I didn't say he would lose if he didn't

attend. If I'd said that, he never would have. Instead, I said, "You're the only one who knows" (internal frame of reference) "who would lose" (moving away from) "if you didn't go." He said, "Yea, that's true," and he went to the back of the room and signed up. Before I learned about metaprograms, I would have tried to persuade him by having him talk to other people (external frame of reference) who had taken the course, and I would have told him about all the benefits he would derive (move toward). But that would have been the way to get me interested, not him.

The third set of metaprograms involves sorting by self or sorting by others. Some people look at human interactions primarily in terms of what's in it for them personally, some in terms of what they can

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do for others. Of course, people don't always fall into one extreme or they other. If you sort only by self, you become a self-absorbed egotist. If you sort only by others, you become a martyr.

If you're involved in hiring people, wouldn't you want to know where an applicant fits on this scale? Not long ago a major airline found that 95 percent of its complaints involved 5 percent of its employees. These 5 percent sorted strongly by self; they were most interested in looking out for themselves, not others. Were they poor employees? Yes and no. They were obviously in the wrong jobs and obviously doing a poor job, though they might have been smart, hardworking, and congenial. They may have been the right people, put in the wrong slots.

What did the airline do? It replaced them with people who sorted by others. The company determined this through group interviews in which prospective employees were asked why they wanted to work for the airline. Most of the individuals thought they were being judged by the answers they gave in front of the group, when in fact they were being judged by their behavior as members of the audience. That is, individuals who pad the most attention and gave the most eye contact, smiles, or support to the person who was doing the speaking at the front of the room were given the highest rating, while those who paid little or no attention and were in their own world while others were talking were considered to be primarily self-sorting and were not hired. The company's complaint ratio dropped

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over 80 percent as a result of this move. That's why metaprograms are so important in the business world. How can you evaluate a person if you don't know what motivates him? How can you match the job you have available with the correct person in terms of required skills, ability to learn, and internal makeup? A lot of very smart people spend their career totally frustrated because they're doing jobs that don't make the best use of their inherent capabilities. A liability in one context can be a valuable asset in another.

   In a service business, like an airline, you obviously need people who sort by others. If you're hiring an auditor, you might want someone who would sort by self. How many times have you dealt with someone who left you in a confused state because he did his

job well intellectually but poorly emotionally? It's like a doctor who sorts strongly by self. He may be a brilliant diagnostician, but unless you feel he cares about you, he won't be totally effective. In fact, someone like that would probably be better off as a researcher than as a clinician. Putting the right person in the right job remains one of the biggest problems in American business. But it's a problem that could be dealt with if people knew how to evaluate the ways that job applicants processed information.

   At this point, it's worth noting that not all metaprograms are created equal. Are people better off moving toward things rather than away from them? Perhaps. Would the world be a better place if people sorted more by others and less by self? Probably. But

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we have to deal with life the way it is, not the way we wish it were. You may wish your son moved towards things rather than away. If you want to effectively communicate with him, you have to do it in a way that works, not in a way that plays to your idea of how it should work. The key is to observe a person as carefully as possible, listen to what he says, what sort of metaphors he uses, what his physiology reveals, when he's attentive and when he's bored. People reveal their metaprograms on a consistent, ongoing basis. It doesn't take much concentrated study to figure out what people's tendencies are or how they are sorting at the moment. To determine if people sort by self or others, see how much attention they pay to other people. Do they lean toward people and have facial expressions

that reflect concern for what others are saying, or do they lean back and remain bored and unresponsive? Everyone sorts by self some of the time, and it's important to do so sometimes. They key is what do you do consistently and whether your sorting procedure enables you to produce the results you desire.

The fourth sorting program involves matchers and mismatchers. I wan to try an experiment with you. Look at these figures and tell me how they relate to each other.

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If I asked you to describe the relationship between the three figures, you could answer in many ways. You could say they're all rectangles. You could say they all have four sides. You could say two are vertical and one is horizontal, or that two are standing up and one is lying down, or that no figure has precisely the same relationship to the other two. Or that one is different and the other two are alike.

I'm sure you can think of more descriptions. What's going on here? They're all descriptions of the same picture, but they take completely different approaches. So it is with matchers and mismatchers. This metaprogram determines how you sort information to learn, understand, and the like. Some people respond to the world by finding sameness. They look at things and see what they have in common. They're matchers. So when they look at our figures they might say, "Well, they're all rectangles." Another kind of matcher finds sameness with exceptions. He might look at the figures and say, "They're all rectangles, but one is lying down and the other two are standing up."

Other people are mismatcher—differences people. There are two kinds of them. One type looks at the world and sees how things are different. He might look at the figures and say they are all different and have different relationships to one another. They're not alike at all. The other kind of mismatcher sees differences with exceptions. He's like a matcher who finds sameness with exceptions in reverse—he sees the differences first, and then he'll add the things they have in common.

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To determine whether someone is a matcher or mismatcher, ask him about the relationship between any set of objects or situations and note whether he focuses first on the similarities or the differences. Can you imagine what happens when a sameness matcher gets together with a difference mismatcher? When the one says they're all alike, the other says, "No, they're not, they're all different!" The sameness person's rationale is that they're all rectangles. The difference mismatcher's rationale is that the thickness of the lines may not be exactly the same, or that the angles are not exactly the same in all three of them. So who's right? They both are, of course; it depends on a person's perception. However, mismatchers often have difficulty creating rapport with people because they are always creating differences. They can more easily develop rapport with other mismatchers.

How is understanding these distinctions important? Let me give an example from my business. I have five partners, and all but one of us are matchers. For the most part, this is terrific. We're alike, so we like each other. We think the same way and see the same things, so in our meetings we can achieve a wonderful synergy; we're all talking and coming up with ideas, and they all look better and better because we're matching one another, seeing what the others are seeing, building on their insights, getting more and more excited.

Until our mismatcher weighs in, that is. Without fail, he sees things differently from the way we do. While we see the way things fit together, he sees the way

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they don't. While we get enthusiastic and move along, he jumps in and tells us it's not going to work, then sits back like a bump on a log—not paying attention to what we see and instead seeing all sorts of problems we don't want to worry about. We want to soar into the mental ozone. He wants to get back to square one and say, "Oh yeah? What about this? What about that?"

Is he a pain in the neck? You bet he is. Is he a valuable partner? He sure is. What we need to do is use him at the appropriate time in the planning process. We don't want him harping on details and ruining our brainstorming. The synergy we get from planning together is more valuable than his nitpicking at the time. Then after we've slowed down, we desperately need someone who sees the holes, sees the incongruities,

sees how things don't fit, how they don't match. That's the function he plays, and it often saves us from ourselves.

Mismatchers are in the minority. The generalizations offered by survey show that about 35 percent of the people interviewed were mismatchers. (If you're a mismatcher, you'll probably say the surveys are not accurate.) However, mismatchers are extremely valuable because they tend to see what the rest of us don't. Mismatchers aren't usually the souls of poetic inspiration. Many times, even when they get excited, they'll start mismatching and find a way to get unexcited. But their critical, analytical sensibilities are important to any business. Think of a titanic

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business failure like the movie Heaven's Gate. If you'd been able to look behind the scenes, you might have found a bunch of creative matchers with internal frames of reference—all moving toward the goal and not looking at anything they need to move away from. They desperately needed a mismatcher to say, "Wait a second. What about this?" and communicate it in a way that could be accepted by the creative people's internal frames of reference.

Matching or mismatching modes are extremely important because they can play out in so many ways, even in nutrition. Extreme matchers can often end up eating food that's bad for them, because they want food that is always the same. They wouldn't want an apple or a plum. There's too much variety in ripeness,

texture, tastes, shelf time, and other assorted variables. Instead they might eat a lot of junk food because it doesn't change. It might be lousy food, but it warms a matcher's unvarying soul.

If you have a job that requires the same repetitive work, year after year, would you want to hire a difference person? Of course not. You want to hire a sameness person—he'd be very, very happy in such a job for as long as you needed him there. If, however, you have a job that requires a great deal of flexibility or constant change, would you want to hire a sameness person in that position? Obviously not. These distinctions can be very useful in discovering what kind of jobs people would be most happy at for the longest period of time.

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Consider the case of a football field goal kicker. A few years back, he began the season with great success, kicking with remarkable accuracy. But since he was a mismatcher, he soon felt obligated to begin varying his routine, and he went into a slump. He was persuaded to concentrate on the different kinds of fans behind the goal post in each different stadium. By focusing on how different they were, he could mismatch to his heart's content on something trivial while still performing his best in the same way in what really mattered.

Would you use the same persuasion techniques on a matcher and a mismatcher? Would you want them in the same job? Would you treat two kids with different matching strategies in the same way? Of course not. This is not to say the strategies are immutable.

People are not Pavlovian dogs. They can modify their strategies to some extent, but only if someone talks to them in their own language about how to do that. It takes tremendous effort and patience to turn a lifelong mismatcher into a matcher, but you can help him make the most of his approach and be a little less churlish and doctrinaire in the process. That's one of the secrets of living with people who are different from you. On the other hand, it's useful for matchers to see more differences, for they have a tendency to generalize. It might be useful for a matcher to notice all the differences between this week and last week, or between the cities they visit (instead of saying Los Angeles is very much like New York). Focus a little on the *differences*, too—they are part of the spice of life.

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Can a matcher and a mismatcher live happily together? Sure—just as long as they understand each other. That way, when differences occur they'll just realize the other person isn't bad or wrong, he/she just perceives things in a different way. You don't have to be totally alike to establish rapport. You do need to remember the differences in the ways you both perceive things and learn how to respect and appreciate each other.

The next metaprogram involves what it takes to convince someone of something. The convincer strategy has two parts. To figure out what consistently convinces someone, you must first find out what sensory building blocks he needs to become convinced and then you must discover how often he has to receive

these stimuli before becoming convinced. To discover someone's convincer metaprogram, ask, "How do you know when someone else is good at a job? Do you have to a) see them or watch them do it, b) hear about how good they are, c) do it with them, or d) read about their ability?" The answer may be a combination of these. You may believe someone's good when you see him do a good job and when other people tell you he's good. The next question is, "How often does someone have to demonstrate he's good before you're convinced?" There are four possible answers: a) immediately (for example, if they demonstrate that they're good at something once, you believe them), b) a number of times (two or more), c) over a period of time (say, a few weeks or a month or a year), and d) consistently. In the last case,

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a person had to demonstrate that he's good each and every time.

If you're the head of an organization, one of the most valuable states you can achieve with your key workers is trust and rapport. If they know you care about them, they'll work harder and better for you. If they don't trust you, they won't deliver for you. But part of establishing that trust is being attentive to the different needs of different people. Some people will establish a relationship and maintain it. If they know that you play fair and that you care about them, you can establish a bond that will last until you do something to betray it.

This doesn't work for everyone. Some workers need more than that, whether it's a kind word, an approving memo, a show of public support, or an important task to perform. They may be just as loyal and just as talented, but they need more verification from you than other people do. They need more proof that the bond between you still holds. Likewise, any good salesman knows customers he only had to sell once, and they were customers forever. Other people have to see the product two or three times before they decide to buy, while for others maybe six months can pass before there is a need to sell to them again. Then of course there is the salesman's "favorite"—the man who has used your product for years, and every time you come in he wants to know again why he should use it. He has to be shown every time. The same process plays out with even greater intensity in personal relationships. With some

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people, if you can prove your love once, you've proved it forever. With others, you have to prove it every day. The value of understanding these metaprograms is that they provide you with the game plan for convincing someone. You know in advance what it will take to convince him, and you're no longer upset by the person you have to show every time. You expect that behavior from him.

Another metaprogram is possibility versus necessity. Ask someone why he went to work for his present company or why he bought his current car or house. Some people are motivated primarily by necessity, rather than by what they want. They do something because they must. They're not pulled to take action by what is possible. They're not looking for infinite varieties of experience. They go through life

taking what comes and what is available. When they need a new job or a new house or a new car, or even a new spouse, they go out and accept what is available.

Others are motivated to look for possibilities. They're motivated less by what they have to do than by what they want to do. They seek options, experiences, choices, and paths. The person who is motivated by necessity is interested in what's known and what's secure. The person who is motivated by possibility is equally interested in what's not known. He wants to know what can evolve, what opportunities might develop.

If you were an employer, which kind of person would you most want to hire? Some people would probably answer, "The person who is motivated by

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possibility." After all, having a rich sense of potential makes for a richer life. Instinctively, most of us (even a lot of people who are motivated by necessity) would advocate the virtues of remaining open to an infinite variety of new directions.

In reality, it's not that cut-and-dried. There are jobs that require attention to detail, steadfastness, and consistency. Let's say you're a quality-control inspector at an auto plant. A sense of possibility is nice. However, what you might need most is a sense of necessity. You need to know exactly what's needed, and you have to verify it's being done. Someone motivated by possibility would probably be bored stiff in a job like that, while someone motivated by necessity would feel perfectly attuned to it.

People who are motivated by necessity have other virtues as well. Some jobs place a particular virtue on permanence. When you fill them, you want someone who'll last for a long time. A person motivated by possibilities is always looking for new options, new enterprises, and new challenges. If he finds another job that seems to offer more potential, there's a good chance he'll leave. Not so the somewhat plodding soul who is motivated by necessity. He takes a job when he needs one. He sticks with it because working is a necessity of life. There are many jobs that cry out for a dreamy-eyed, swashbuckling, risk-taking believer in possibility. If your company were diversifying into a whole new field, you'd want to hire someone who'll be attuned to all of the possibilities. And there are other

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jobs that place a premium on solidity, consistency, and longevity. For those jobs you need someone who is motivated most by what he needs. It's equally important to know what your own personal metaprograms are so that if you're looking for a job, you can select one that will best support your needs.

The same principle works in motivating your children. Let's say you're trying to stress the virtues of education and going to a good college. If your child is motivated by necessity, you have to show her why she needs a good education. You can tell her about all the jobs that absolutely require a degree. You can explain why you need a foundation in math to be a good engineer or in language skills to be a good teacher. If your kid is motivated by possibility, you would take a different approach. She's bored by what she has to do, so you'd stress the infinite possibilities open to those with a good education. Show her how learning itself is the greatest avenue for possibility – Fill her brain with images of new avenues to be explored, new dimensions to be opened, new things to be discovered. With each child the result will be the same, although the way you lead her there is very different.

Another metaprogram is a person's working style. Everyone has his own strategy for work. Some people are not happy unless they're *independent.* They have great difficulty working closely with other people and can't work well under a great deal of supervision. They have to run their own show. Others function best as part of a group. We call their strategy a *cooperative*

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one. They want to share responsibility for any task they take on. Still others have a proximity strategy, which is somewhere in between. They prefer to work with other people while maintaining sole responsibility for a task. They're in charge but not alone.

If you want to get the most out of your employees, or your children, or those you supervise, figure out their work strategies, the ways in which they're most effective. Sometimes you'll find an employee who is brilliant but a pain in the neck. He always has to do things his way. Now he just might not be cut out to be an employee. He may be the kind of person who has to run his own business, and sooner or later he probably will if you do not provide an avenue of expression. If you have a valuable employee like this, you should

try to find a way to maximize his/her talents and give him/her as much autonomy as possible. If you make him part of a team, he'll drive everyone crazy. But if you give him as much independence as possible, he can prove invaluable. That's what the new concepts of entrepreneurship are all about.

You've heard of the Peter Principle, the idea that all people are promoted to the level of their incompetence. One reason this happens is that employers are often insensitive to their employees' work strategies. There are people who work best in a cooperative setting. They thrive on a large amount of feedback and human interaction. Would you reward their good work by putting them in charge of some new autonomous venture? Not if you want to make use of

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their best talents. That doesn't mean you have to keep a person at the same level. But it does mean you should give promotions and new work experiences that utilize the person's best talents, not his worst ones.

Likewise, many people with proximity strategies want to be part of a team but need to do their own work alone. In any structure there are jobs that nurture all three strategies. The key is to have the acuity to know how people work best and then find a task they thrive in.

Here's an exercise to do today. After reading this chapter, practice eliciting people's metaprograms. Ask them: What do you want in a relationship (or house or car or career)? How do you know when you have been successful at something? What is the relationship between what you are doing this month and what you did last month? How often does someone have to demonstrate something to you before you are convinced it's true? Tell me about a favorite work experience and why it was important to you.

Does the person pay attention to you wile you are asking these questions? Is he interested in your response, or is he occupied elsewhere? These are only a few of the questions you can ask to successfully elicit the metaprograms we've discussed. If you don't get the information you need, rephrase the question until you do.

Think of almost any communication problem you have, and you'll probably find that understanding the person's metaprograms will help you adjust

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communications so that the problem disappears. Think of a frustration in your life – someone you love who doesn't feel loved, someone you work for who manages to rub you the wrong way, or someone you've tried to help who hasn't responded. What you need to do is identify the operating metaprogram, identify what you are doing, and identify what the other person is doing. For example, suppose you need verification only once that you have a loving relationship, and your partner needs it consistently. Or you put together a proposal that shows how things are alike, and your supervisor only wants to hear about the ways they're different. Or you try to warn someone about something he needs to avoid, and he's only interested in hearing about something he wants to go after.

When you speak in the wrong key, the message that comes through is the wrong one. It's as much a problem for parents dealing with their children as it is for executives dealing with their employees. In the past, many of us have not developed the acuity to recognize and calibrate the basic strategies that others use. When you fail to get your message through to someone, you don't need to change the content. You have to develop the flexibility to be able to alter its form to fit the metaprograms of the person with whom you're trying to communicate.

You can often communicate most effectively when you use several metaprograms together. My partners and I once had a business development with a man who did some work for us. We got together,

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and I began the meeting by trying to set a positive frame, saying I wanted to create an outcome that would satisfy both of us. He immediately said, "I'm not interested in any of that. I have this money, and I'm going to hang on to it. I just don't want your attorney calling and bugging me anymore." So he began to move away. I said, "We want to make this work because we're all committed to helping people and ourselves experience a better quality of life, and by working together we can do that." He said, "We're not all committed to helping other people. I don't give a damn about you. All I care about is that I leave here happy." As the meeting continued with very little progress, it became clear that he moved away from, that he sorted by self, that he mismatched, that he had

an internal frame of reference, and he didn't believe things unless he saw them, heard them, and had them continually reinforced.

These metaprograms did not add up to a blue print for perfect communication, especially since I'm the opposite of almost all these things. We talked for almost two hours with no progress, and I was almost ready to give up. And then a light bulb finally lit up in my head, and I changed gears. I said, "You know that idea you have in your mind, I have it right here." Then I made a fist. So I took his internal frame of reference, which I couldn't manipulate with words, and I externalized it, so I could control it. Then I said, "I have it right here and you've got sixty seconds. Make your decision or you're about to lose and lose big. I'm not going to lose,

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but you're going to lose personally." That gave him something new to move away from.

I went on from there. I said, "You're [self] going to lose [move away from] because you don't believe there's a solution that can be worked out." Well, he was a mismatcher, so he started to think the opposite, that there was a solution. Then I went on, "You better check inside yourself and see [internal frame of reference] if you're really willing to pay the price that you're going to have to pay, day after day, as a result of your decisions today. Because I'm going to continually tell people [his convincer strategy] about how you behaved here and what you did. You've got one minute to decide. You can decide now that you want to work this thing out otherwise you're going to

lose everything – you personally, forever. Check me out. See if I'm congruent."

It took him twenty seconds to jump up and say, "Look, guys, I always wanted to work with you. I know we can work things out." He didn't do it grudgingly. He got up enthusiastically, as though we were true pals. He said, "I just wanted to know we could talk." Why so positive after two hours? Because I'd used his metaprograms, not my model of the world, to motivate him.

What I had said would have been an insult to me. I used to get frustrated with people when they behaved in ways that were the opposite of mine until I learned that different people have different metaprograms and patterns.

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The metaprogram-sorting principles we've dealt with so far are important and powerful. However, the crucial thing to remember is that the number of metaprograms you're aware of is limited only by your sensitivity, awareness, and imagination. One of the keys to success in anything is the ability to make new distinctions. Metaprograms give you the tools to make crucial distinctions in deciding how to deal with people. You are not limited to the metaprograms discussed here. Become a student of possibility. Constantly gauge and calibrate the people around you. Take note of specific patterns they have for perceiving the world and begin to analyze if others have similar patterns. Through this approach you can develop a whole set of distinctions about people that can empower you in knowing how to communicate effectively with all types of people.

For example, some people sort primarily by feelings and others sort by logical thoughts. Would you try to persuade them in the same way? Of course not. Some people make decisions based only on specific facts and figures. First they have to know if the parts will work – they'll think about the broader picture later. Others are convinced first by an overall concept or idea. They react to global chunks. They want to see the big picture first. If they like it, then they'll think about the details. Some people are turned on by beginnings. They're most excited when they get a new idea off the ground, and then they soon tend to lose interest in it and go on to something else. Others are fixated on completion. Anything they do they have to see all the way to the end, whether it's reading a book or doing a task at work. Some people

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sort by food. That's right, by food. Almost anything they do or consider doing is evaluated in terms of food. Ask them how to get someplace, and they'll say, "Go down the road until you get to Burger King, make a left, and then continue down until you get to McDonald's and make a right, and then make a left at Kentucky Fried Chicken until you get down to that chocolate-brown building." Ask about a movie they went to, and they immediately begin telling you about how bad the concession stand was. Ask about the wedding, and they'll tell you about the cake. A person who sorts primarily by people will talk mostly about the people at the wedding or the people in the film. A person who sorts primarily by activities will talk about what actually happened at the wedding, what happened in the film, and so on.

The other thing an undertaking of metaprograms provides is a model for balance. We all follow one strategy or another for using metaprograms. For some metaprograms we may lean slightly more to one side than another. For others we may swing wildly to one strategy instead the other. But there's nothing carved in stone about any of those strategies. Just as you can make the decision to put yourself in an empowering state you can choose to adopt metaprograms that help rather than hinder you. What a metaprogram does is tell your brain what to delete. So if you're moving toward, for example, you're deleting the things you're moving away from. If you're moving away from, then you're deleting the things that could be moving toward. The change your metaprograms, all you have to do is

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become aware of the things you normally delete and begin to focus your attention on them.

Don't make the mistake of confusing yourself with your behaviors or doing the same thing with someone else. You say, "I know Joe. He does this, this, and this." Well, you don't know Joe. You know him through his behaviors. But he isn't his behaviors any more than you are yours. If you're someone who tends to move away from everything, maybe that's your pattern of behavior. If you don't like it, you can change. In fact, there's no excuse for you not to change. You have the power now. The only question is whether you have enough reasons to make yourself use what you know.

There are two ways to change metaprograms. One is by Significant Emotional Events – "SEEs." If you

saw your parents constantly moving away from things and not being able to achieve their full potential as a result, it might influence the way you move toward or away. If you only sorted by necessity and missed out on some great job opportunity because the company was looking to someone with a dynamic sense of possibility, you might be shocked into changing your approach. If you tend to move toward everything and get taken in by a flashy-looking investment scam, it would probably affect the way you look at the next proposal that comes your way.

The other way you can change is by consciously deciding to do so. Most of us never give a thought to which metaprograms we use. The first step toward change is recognition. The awareness of exactly what

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we are currently doing provides the opportunity for new choices and thus for change. Let's say you realize that you have a strong tendency to move away from things. How do you feel about it? Sure, there are things you want to move away from. If you put your hand on a hot iron, you would want to move it away as soon as you could. But aren't there things you really want to move toward? Isn't a part of being in control making a conscious effort to make a move toward something? Don't most great leaders and great successes move toward things rather than away? So you might want to begin to stretch a little. You can start thinking about things that appeal to you and actively move toward them.

You could also think of metaprograms on a higher level. Do nations have metaprograms? Well, they have

behaviors, don't they? So they have metaprograms, too. They're collective behavior many times forms a pattern, based upon metaprograms of their leaders. The United States for the most part has a culture that seems to move toward. Does a country like Iran have an internal or external frame of reference? Think of the last election. What was Walter Mondale's basic metaprogram? Many people perceived him as moving away. He talked about doom and gloom and how Reagan wasn't telling the truth and would raise your taxes. He told us, "At least I'll tell you now we have to raise taxes or disaster is certain." I'm not saying he was right or wrong; just note the pattern. Ronald Reagan was sounding nothing but positive notes, while Mondale was perceived as invoking dark issues. Mondale might have made a lot of sense.

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There were some major issues the nation needed to confront. But on an emotional level—which is where much of politics is played out—Reagan's metaprogram seems to have more effectively matched the nation.

Like everything else in this book, metaprograms should be used on two levels. The first is a tool to calibrate and guide our communication with others. Just as a person's physiology will tell you countless stories about him, his metaprograms will speak eloquently about what motivates him and frightens him off. The second is as a tool for personal change. Remember, you are not your behaviors. If you tend to run any kind of pattern that works against you, all you have to do is change it. Metaprograms offer one of the most useful tools for personal calibration and change.

And they provide keys to some of the most useful communication tools available.

In the next chapter, we'll look at other invaluable communication tools—tools that will show you...

END OF SAMPLE CHAPTER

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NOTES

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