

Optimizing Sales Performance

Defining, Supporting, and Managing Your Best Practices Sales Process with The Six Boxes® Approach



A White Paper from The Performance Thinking Network Carl Binder, PhD, CPT

Sales Enablement: How do we do it?

The phrase *sales enablement* has become a standard term in the language of those who support sales performance. There are currently 37 LinkedIn groups with this phrase in their titles. There are software companies, products, consultancies, and all kinds of online resources that include *sales enablement* in their names, descriptions, or value propositions. It's a great descriptive phrase for marketing products and services, but, like many such catch phrases, means different things to different people.

While companies have always invested large sums, year in and year out, to educate and train their sales people, they have not always reaped the best possible returns on those investments. The term first came to our attention during the 1990's when my former consulting firm, Product Knowledge Systems, Inc., was a pioneer in the field of sales knowledge management, performance-based training, and sales performance support. In that era, many sales marketing automation and products, books, conferences and experts exploded into the marketplace, most claiming to be the next big thing. There were many flavors-of-the-month (or year). But often the marketing messages obscured an underlying question: How do we do sales enablement in the most cost-effective way?

Beyond Sales Training: Optimizing ROI

The good news about the phrase *sales enablement* is that it points beyond sales training to a more holistic, combined set of factors needed to support or enable sales success. It counters the knee-jerk assumption that training is a sufficient vehicle for improving performance, an assumption that virtually never holds true. While companies have always invested large sums, year in and year out, to educate and train their sales people, they have not always reaped the best possible returns on those investments. That ROI depends to a large extent on how well they set expectations for their people and what combinations of interventions, other than training, they put in place to support sales success. Those enabling factors come from sales organizations themselves, from product and marketing groups, sales training, IT, field operations teams, and sometimes from other sources within and outside the organization.

Perhaps more than most business functions, sales organizations recognize and actively fund all kinds of interventions intended to accelerate results, including online tools, coaching and manager development, aggressive incentive and reward systems, customer materials, outreach programs, and more. For this reason, it's often much easier to bring sales trainers, sales managers, executives, and field operations groups together with a focus on the same business results: sales revenues, sales efficiency, customer retention, and so on. But what we've noticed over several decades is that despite such efforts to

coordinate different groups and functions, the parts don't always fit together to produce desired results in the most cost-effective way.

Why is that?

Challenges for Sales Enablement

There are at least three challenges that any organization responsible for sales enablement must address, and the success with which they address them will determine ROI:

Challenge 1 – Defining expected sales performance: It's remarkable how many large companies lack a documented, consistently implemented sales process. Many sales organizations adopt what I would call "generic" models of the sales process, describing either face-to-face interactions or enterprise-level account management. Such classic sales books as SPIN Selling and Solution Selling are the tip of the iceberg when it comes to the sales effectiveness literature, and the models described in those books have become standards for countless sales organizations. While such models provide helpful guidelines for sales training and coaching, they are seldom sufficiently detailed nor specific to describe the milestones that sales professionals must achieve to successfully close deals with their particular products in their particular markets. Companies often lack such "maps" to sales success.

Sales automation and customer relationship management software usually require sales operations groups to define stages in the pipeline from unqualified sales leads to closed deals and repeat business. Even many small companies nowadays have sales pipeline management software that supposedly steps sales representatives and sales managers through the process.

Upon closer inspection, however, such pipeline definitions might not always be as helpful as they appear. One of the most common areas of weakness is

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that sales pipelines, as defined in many companies, comprise a series of completed activities, not defined outcomes or accomplishments. For example, we often see such milestones as customer meeting completed or demonstrate personal capability rather than list of verified customer needs or decision-makers who seek our advice. In these examples, the first two are descriptions of activities, while the second two are accomplishments produced by those activities. Sales automation systems often encourage this approach of reporting on activities rather than on accomplishments or achievements. But sales activities are costly, while sales accomplishments have value because they mark progress toward sales revenue. Thus, one key for optimizing ROI in the sales process is to focus sales people on achieving valuable accomplishments, not merely on engaging in costly activities.

In the sales literature there is a classic distinction between sales calls that "advance" the sale, versus those that merely "continue" the process. This is the same distinction that we're making here between achieving important milestones or benchmarks that represent progress, and engaging in activity that might or might not be making a difference.

One of many problems arising from descriptions of sales processes based on activities is that it is often difficult to determine unambiguously when one activity is complete and the next one has begun. A metrics specialist from the National Sales Operations group in one of our client companies expressed his frustration over the fact that different sales people and managers in his company define activities differently, so that indicators of pipeline progress become subject to wide interpretation.

What we need is an unambiguous description or map of the process that sales people, sales managers, and sales enablement groups can use to monitor progress from one milestone or achievement to the next, and coordinate efforts in a consistent, efficient way to help sales people move toward closed deals.

Challenge 2 – Identifying and enabling best practices strategies and tactics: In organizations that define sales performance, or process, mostly as a series of activities, it is tempting to focus on best practices sales behavior – those strategies and tactics that the most successful people seem to use. We've seen many organizations with long documents or PowerPoint decks that describe key activities thought to comprise effective sales in those organizations.

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However, without clear milestones that define the end of each set of activities (e.g., qualified lead, request for proposal, contract ready to sign), it is often difficult to see when a given activity is being successful, or how it can be improved. Activity itself becomes the focus, rather than the results or accomplishments produced at each step along the way.

To define best practices, we need to have a crisp understanding of what they are "best" at producing, what outcomes they achieve more efficiently or effectively than other possible strategies and tactics. Simply reporting the activities of sales people who exceed their numbers is unlikely to capture true best practices because even the very best sales people usually have strengths and weaknesses across the full range of activities and milestones in any relatively complex sales process. Before we can identify best practices, we need to understand what each practice is trying to achieve, who more consistently or more frequently achieves that milestone, and what tasks and tactics distinguish their performance from average performance in achieving each milestone in the sales process.

Many sales organizations talk about best sales practices, and try to emulate them. But few have effective ways of identifying them for their sales teams in their particular competitive sales environments. If sales organizations are to keep up with the competition in today's fast-moving business environments, they must have a way of identifying new best practices as they emerge, to take advantage of what their more innovative sales teams and individuals learn through winning and losing day-to-day.

Challenge 3 – Configuring, aligning and managing sales enablers: Once we've identified best practices sales behavior, how should we enable it? That's the \$64,000 question – probably the \$64,000,000 question these days. Countless books, training packages, coaching methods, and sales support tools claim to have answers.

We know for sure that the sheer number of possibilities is overwhelming, and that sales organizations and the communities of experts and consultants that advise them seem to come up with new ideas, new weapons, and new fads almost every annual budget cycle. Every year we have the next big thing – assuming we can garner support and allocate budget to whatever it is. There's no doubt that a lot of experts are making a lot of money.

The challenge for all of us involved in sales enablement is to decide how to allocate precious resources, and what combinations of enablers to choose.

But how can we systematically think through and configure the best combination of training and non-training supports and interventions for supporting our particular sales process? Many executives and organizations have their favorite interventions or combinations. But few have a holistic or comprehensive way of pulling it all together.

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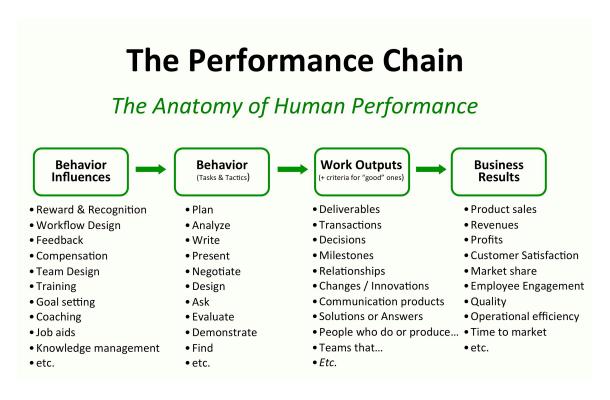
How Six Boxes® Performance Thinking Can Help

Six Boxes Performance Thinking, also called the Six Boxes® Approach, helps us define performance and identify what's needed to improve it by using two plain English, research-based models to answer three key questions about human performance:

1. What is human performance? Try asking this question in a room full of trainers, managers, or other people involved with managing or improving performance. We typically get answers that refer to different aspects of performance in organizations: whatever it takes to produce business results, day-to-day behavior, factors that influence performance such as motivation, and so on. In other words, we tend to look at and emphasize different facets of performance, depending on our personal backgrounds, perspectives, and job functions.

But in order to manage or improve human performance, we need to have a clear, crisp definition of its *anatomy* – the elements that comprise it. I compare this to the need for a heart surgeon to know the anatomy of the chest, the parts and organs of the chest, where they are located and how they work together. If a surgeon doesn't know anatomy, I certainly don't want him or her operating on my chest. Similarly, if a manager or performance improvement professional is not clear about the elements of performance and how they work together, then I'm not confident in their ability to help.

We use a simple, plain English model called the *Performance Chain* to define the anatomy of human performance:



This model distinguishes between the elements or "anatomical features" of human performance in organizations, and enables us to define and align the performance of individuals and groups with the desired results of the business.

To summarize, human performance entails behavior (activity) that produces desired work outputs (accomplishments) that are valuable to the organization because they contribute to business results. We define criteria for "good" work outputs as those features of the work outputs themselves that make them more likely to contribute to business results, customer requirements, and/or corporate values. For example, one of the features of a "good" sales proposal (a work output) that is expected to contribute to company profitability (a business result) is that it includes pricing that is profitable for the company. This is in addition to such criteria as being easy to read for the intended

audience, that it contains all the sections defined in a template based on successful proposals, and that it addresses verified customer needs or problems.

Notice that the work outputs of human performance can include not only specific deliverables and completed transactions, but also less tangible products of behavior such as decisions, effective relationships, or people who say they would do business with us again. The work outputs are essential to our description of performance because they a) define the successful products of behavior that can be agreed upon and measured, and b) they link behavior to business results.

In defining the successful sales process for your particular organization, we would identify the specific work outputs (milestones, deliverables, decisions, etc.) along the way from the beginning of the sales process to its final product (e.g., signed contracts, product delivered and paid for, etc.) And we would do our best to identify criteria, based on successful experience, that tell us when each work output is "good" or valuable.

Once we have clearly identified work outputs, only then is it possible to focus on best practices behavior in an unambiguous way. We know that among sales people there is often great variation in tasks and tactics employed to achieve milestones, and there is nothing wrong with such variation. In fact, when we clearly define milestones, we can "liberate" behavior in a way that allows individuals and teams to discover what is most effective for them, measured by progress through milestones.

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At the same time, if there are tasks and tactics (behavior) that seem to achieve milestones more consistently, more efficiently, or with greater customer satisfaction, then we can "harvest" them as best practices and leverage them across the organization by encouraging others in the sales force to give them a try. The intended result is to raise the average

performance of the group toward the level achieved by the very best. While not all will become "super stars," raising the average of a group even partway toward the performance of super stars can have significant economic value. This is what our predecessor, Tom Gilbert, called *exemplary behavior analysis*, and can be very powerful.

Once having identified successful behavior, we can then focus our sales enablement efforts – training, coaching, account strategies, sales collateral, and so on – on the specific milestones that we need sales people to achieve on the path to business results.

2. What drives human performance? We can see in the Performance Chain the phrase behavior influences. By that term we mean all the factors that influence behavior, both positive and negative. Some, such as compensation plans, sales automation, and customer materials, come from the environment that our organization provides. Other behavior

influences are individual factors, such as skills and knowledge, the specific personal characteristics or "capacities" that individuals bring to their jobs, or individual motives and preferences. Combined, these comprise the entire system of influences that support and/or get in the way of successful performance.

A big challenge is that everyone has their own favorite behavior influences (e.g., training), and there is an endless list of possibilities to choose from. So how do we decide how to arrange conditions for optimal performance?

We use a second plain English framework, the Six Boxes[®] Model, to organize, understand, and configure all the behavior influences needed to drive desired behavior.

The Six Boxes® Model of Behavior Influence **Expectations** Tools Consequences **Environment** Feedback Resources Incentives Skills Selection & Motives & Preferences Assignment & Individual Knowledge 'Attitude' *'Capacity'* 4 5 6

Having evolved in our work since the mid 1980's, this model is comprehensive. Its cells, and the relationships among the cells (e.g., between expectations and consequences), cover every kind of variable, or behavior influence, known from research as well as from practical experience, to influence human behavior in organizations. Built to support plain English communication and collaboration, the Six Boxes Model serves as a useful guide for training and non-training performance professionals as well as for managers and executives as they plan and execute efforts to support and improve performance. Because of its relative lack of obscure jargon, it enables professionals from multiple functions and groups across the organization to communicate, collaborate, and align behavior influences that they provide to accelerate successful sales performance.

We know that factors in all of these categories must be in place – and, in fact, are always in place – in relation to behavior. Our purpose in using this model is to select and



implement the most cost-effective and well-coordinated combination of positive behavior influences possible, to support the behavior needed to produce valuable work outputs.

3. How can we understand and improve human performance? Given our two models, how can you use them to understand and improve the performance of sales professionals? Performance Thinking offers what we call *Performance Improvement Logic* as a way of thinking through solutions to this challenge for any given situation or type of performance.

Performance Improvement Logic, as they say, is not rocket science. Rather, it is a practical sequence of logical steps that we can use, flexibly and at different levels of detail, to apply the two models in any given situation.

For complex projects and performance improvement efforts, we describe the logic in 7 steps. For front-line managers and team leaders, we reduce it to a basic 3-step sequence. In either case, it covers the same ground, analyzing or pulling apart the Performance Chain to

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describe desired performance, and then using the Six Boxes Model to analyze current conditions and re-configure behavior influences to support that performance. Here is the simplest version, the 3-step coaching sequence:

- 1. **Pinpoint desired performance:** Following the Performance Chain, we identify the work outputs (sales milestones) needed to achieve desired business results. We verify that these milestones contribute to business results, clarify criteria for "good" work outputs at each stage, and then discover what behavior most reliably produces the desired work outputs. Once we've pinpointed desired performance, we can select measures for monitoring progress through milestones (work outputs), behavior, and business results.
- 2. **Investigate and plan behavior influences:** Following an A-B-C sequence, we first Analyze current behavior influences; then Brainstorm possible behavior influences for counteracting negative conditions and optimizing desired behavior; and finally Choose behavior influences to support desired behavior.
- 3. **Take action and adjust based on results:** We implement agreed-upon behavior influences, continue to monitor and measure performance, and make changes in recommended behavior and behavior influences when progress monitoring suggests the need for a change.

When sales enablement professionals follow this logic, the steps are more detailed and technical in nature. But the approach is still the same, simply at a more rigorous and fine-grained level.

One of the powerful benefits of this approach is that, because of its plain English language and conceptual simplicity, everyone in all functions and levels can share the models and approach as they work to understand and improve performance.

Sales training groups as well as sales automation, field operations, marketing, and others can come together with these models in mind to align and coordinate efforts for supporting sales success. Our work on product launches and on more general sales enablement efforts across many different industries has often involved planning meetings and coordination that take advantage of this shared approach to performance.

Specific Sales Enablement Recommendations

Hopefully this brief overview makes clear, conceptually, how the Six Boxes Approach can be applied to sales enablement. The following pages provide a few specific and more technical recommendations, based on this conceptual understanding, of how we and our Affiliates help organizations improve sales performance.

Define Sales Process with a Focus on Work Outputs (milestones)

It should be obvious that our first recommendation is to identify and crisply define the countable work outputs, or sales milestones, that represent progress on the path to closed sales and repeat business. When sales people or sales enablement professionals present us with sales process models emphasizing sequences of activities, we work with them to identify the specific work outputs that represent successful completion of those activities.

Such work outputs might include completion of internal documents (e.g., list of verified customer needs), decisions (e.g., sales person's decision to expand the account, customer decision to request a product demo), relationships established (e.g., trusting, transparent relationship with internal Champion), external documents (e.g., proposal that meets specific criteria), completed transactions (e.g., master service agreement), and so on.

The key is to define these milestones as *things* (not activities) that can be verified unambiguously with the help of criteria that define whether they are "good" or valuable.

Identify Best Practices Behavior

As a client once said, "There's no such thing here as a best practice, but there are successful practices." What he meant is that in some cases there are a variety of different sets of tasks and tactics that will achieve a desired milestone. However, once we have crisply defined the sales process as a series of milestones, it is often possible to discover

individuals or teams that consistently achieve those milestones more quickly, consistently, or with less effort that others. When we discover such *exemplary performers*, we can interview and observe them, as well as more average performers, to determine what small bits of behavior or self-managed behavior influences contribute to their exemplary performance. When we discover those especially effective tasks and tactics, we can share them through training, documentation, and coaching of others.

Milestones in the sales process usually remain relatively constant for any given product, market, and business environment. But behavior may vary as conditions change or as sales people try new approaches for achieving milestones. For this reason, it's good to leave one's description of the sales process as a "living document" with periodic revisions – especially of recommended behavior (tasks and tactics) discovered among exemplary performers.

Milestones in the sales process usually remain relatively constant ... But behavior may vary as conditions change or as sales people try new approaches for achieving milestones.

In any case, once we know milestones, we can link recommended behavior to those milestones rather than simply encouraging people to behave in certain ways because successful performers, in general, do so.

Maximize ROI with Behavior Influences

We've all probably seen ludicrous examples of unbalanced behavior influences. One of my favorites involved a Senior Executive announcing to the sales force at a product launch meeting that the new product was especially strategic for the company, that it would help to clobber the competition, and that the sales force should focus their efforts on it (setting expectations, box 1 in the Six Boxes Model). At the same time, in the back of the room, experienced sales reps were skimming their new compensation plans to see if there were any bonuses or incentives for selling the new product vs. the old reliable ones. In the absence of such incentives (box 3 in the Six Boxes Model), they asked why they should go to the extra trouble to learn about the new product when they could make and even exceed their goals selling the old ones.

There are many similar examples in most organizations of where the "boxes" of the Six Boxes Model are out of alignment or work at cross-purposes to one another. When Sales Training promulgates a new sales strategy or tactic but Sales Managers do not prompt and reward the new behavior in the field, training often goes to waste. When collateral or programs provided by Marketing do not actually advance specific milestones in the sales process, sales people push back, or simply do not use the marketing collateral. When the fields in sales automation programs fail to specify elements of a "good" political map for the target account, sales people often put useless or incomplete information into the free form fields devoted to political maps, just to comply with sales automation requirements. I'm sure you can think of countless examples.

The Six Boxes Model allows us to think through the variables that influence performance to be sure that what we put in place is consistent, complete, and effective. organizations planning sales enablement, constructing and executing new market strategies, or launching new products, the model helps. For front-line sales managers diagnosing gaps in performance and helping their people 1:1 to achieve milestones more effectively, it is a quick and dirty framework for being sure to cover all the bases.

In any application, the Six Boxes Model, when applied to clearly defined target performance, allows us to put together balanced and likely cost-effective combinations of behavior influences, and to continuously improve them over time.

Simple Examples

Here are a few examples of milestones (work outputs) from the early stages of a typical enterprise-level sales process:

- Introductions to decision-makers and influencers in the account
- Appointment to attend customer planning meeting
- Political Map of key decision-makers
- Preliminary SWOT analysis
- Account Plan
- Etc.....

Here is a draft description of performance and behavior influences for one milestone:

Milestone	Criteria	Behavior	Behavior Influences
(Work Output)	(for a "good" one)	(Tasks & Tactics)	(with box #'s)
Political Map	 Includes players and information specified in template Verified with customer decision-makers Complete in CRM prior to planning meeting 	 Obtain org chart, LinkedIn profiles, and other relevant docs. Ask Champion to identify priorities and areas of influence for each player. Once drafted, verify with Champion, et al. 	 Planning meeting sets deadline for map (1) Manager reviews and provides feedback, as needed – email or 1:1 (1) Template in sales support for complete political map (1,2) CRM system (2) List of sample questions for capturing info (2) Positive impact of having account scoped out (3) "How to" taught in Sales Training module (4)

Information in this format can be used to plan an overall sales enablement program, including training and on-the-job support, as well as coaching by field managers. As new and better tasks and tactics emerge, or behavior influences to support them are developed, they can be specified in this document or in the job aids and other enablers listed.

Conclusion

By now we hope that you see the potential power of applying Six Boxes Performance Thinking to defining and accelerating sales performance. The models and logic of this approach reflect the essence of methods often called *Human Performance Technology* or *Human Performance Improvement*, without the jargon. This approach can help sales training, sales operations, and sales management improve and coordinate their efforts for maximum impact, while clarifying expectations for sales representatives and teams.

The Performance Thinking Network and its Affiliates offers programs for both sales enablement professionals and field managers that teach and then coach them through the process of improving performance with this approach. Our Six Boxes® Practitioner Program can be used to develop staff in sales development and sales operations organizations, and our Six Boxes® Management and Leadership Development and Six Boxes® Performance Coaching programs teach executives, managers, and team leaders how to develop and coach employees as part of building performance-based sales culture.

We encourage you to contact us, or to join our LinkedIn community, to learn more.

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The Performance Thinking Network

The Performance Thinking Network offers programs that enable performance professionals, including training specialists, to apply Six Boxes Performance Thinking in the analysis, design, and implementation of performance interventions and systems. We also provide programs for leaders and managers, using the same models and logic, to help them manage and coach performance day-to-day, and to collaborate with performance professionals using Performance Thinking to drive continuous improvement.

For More Information:

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For additional white papers, publications and other resources, including video clips, visit the Six Boxes Resource Library at: http://www.sixboxes.com/Resources-Library.html

Join the Six Boxes Performance Thinking LinkedIn group by going to: http://www.linkedin.com/groupRegistration?gid=3246434

Dr. Carl Binder began his career in 1971 as a doctoral student at Harvard University with B. F. Skinner, continuing his research in performance measurement and performance improvement in a university-affiliated research center during the 1970's. Since 1982 he has founded four consulting firms while continuing research, development and dissemination of practical, researchbased performance improvement methodologies. Widely published in sales effectiveness, marketing, customer service, instructional design, knowledge management, performance measurement and human performance technology, he is an acclaimed speaker and international consultant. He advises Master's and Doctoral theses at universities both within and outside the U.S., and delivers workshops and coaching as part of the Performance Thinking Network. He is a long-time thought leader and activist in the International Society for Performance Improvement (ISPI) and the International Association for Behavior Analysis (IABA), has been awarded the Fred S. Keller Award for contributions in training and education by the American Psychological Association, the Honorary Lifetime Member and the Thomas F. Gilbert Awards for contributions to the field of performance improvement by ISPI.

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