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The Teachings of Agile are Good for Sales

If productivity of your organization is a concern, your emphasis should be on the people – in Sales these are the account managers and their support environment. The people and not the process will make the difference. So how do you go about improving the performance of your workforce while they're actively seeking opportunities and working on progressing sales campaigns? The answer lies in how you organize their support, and the clues to how to reorganize it lie in the teachings of Agile.

Focusing on productivity, you are looking for bottlenecks in the organization's ***Inputs, Process, and Outputs***. In Sales organization the center of this picture should be the people in the front lines: Account Managers (AM) and Sales Engineers (SE).

The ***Inputs*** from the AM+SE perspective. Here's what they need:

- Sales Tools: Presentations, White Papers, ROI Calculators, Access to advisers such as Corporate SE's, Test Results, Benchmarks, References, etc.
- Education: Customer Education, AM+SE technical skills, AM+SE sales skills
- Goals: Clear quotas that are timely – never delayed beyond first day of the new quarter

The biggest opportunity to alleviate bottlenecks in ***inputs*** is to reduce the time AM's and SE's are spending on looking for information and customizing it. Working in Agile teams that involve both corporate and field people will address this time waste issue. For example:

- Teams organized by geography, meets twice weekly – 30 min sessions
- Team members are AM's, SE's and corporate representatives whose job is to provide support to these teams (content creators, Corporate Systems Engineers, etc.)
- Meetings are divided into two segments: review of key deals, review of hot deals, new entries in pipeline
- This type of quick and dirty team meetings is often referred to as: SCRUM meetings. Each SCRUM team should have a SCRUM Master. In sales it makes sense to appoint the head of the geography as the SCRUM master. Each SCRUM Master should have a trained deputy who's ready to step in when necessary.
- During the SCRUM meeting all Action Items (AI) are captured per customer name

- Securing the support of an executive advocate to close a deal should be dealt with as any other task that's covered in the SCRUM meeting.
- Any topic or task that requires more than a couple of minutes is taken off-line and reported to the team in the next meeting.

Larger sales organizations should set-up regular SCRUM of SCUMS where SCRUM Masters meet regularly, twice monthly is recommended, in a similar quick and dirty format. In these meetings the following will occur:

- Cross-pollination and knowledge exchange among teams
- Surfacing broad organizational needs for training or tools
- Win/Loss lessons learned
- Opportunities to assist each other

The key benefits of working in Agile SCRUM teams:

- Focus and quick response
- Resolution of open items
- Quick surfacing of blockers
- Group dynamics (pressure) stemming from being regularly among peers (sales competitive nature)
- Corporate functions more aligned with field needs
- Quickly identifying requirements and focused needs for training (instead of the usual generic training)
- Corporate deliverables in tune with the field's short term needs
- Ratio of AM's to regional manager can grow – all follow-ups are done in concentrated team meetings.

The challenges in transitioning to the mode of operation of SCRUM Teams:

- Agile breaks the command-and-control hierarchical structure. No longer "whatever the boss says is what you do". In essence, your SCRUM team is your immediate consultancy.
- Managers who are set in their command-and-control behaviors will find it hard to adjust; they will need more handholding during the transition.
- Command and control is actually tightened further by the Agile method; the difference comes from shifting 100% of the responsibility from the manager to the team and to team dynamics – AM's and SEs have to raise tasks and issues in front of peers, and that's a lot more powerful and effective.
- Managers' role transitions to higher level support of their team members. Managers will have to grow into a higher level of their role's function: less supervision – more consultative.
- SCRUM teams have to be relatively small; a good team size is up to 10 – 12 people.
- Once started, you can't break the process – you can't decide on-the-fly to skip SCRUM meetings. This new type of discipline will be taken seriously only if followed strictly. The meeting belongs to all members, and not just to the team leader.

Now to the sales ***Process*** from the AM+SE perspective. Here's what they do:

If we are focusing on AM's and SE's, their process is how they actually do prospecting, relationship building with customers, and how they bring deals to closure.

I propose to rank all AM's and SE's into three buckets: 20 – 50 – 30.

The top 20% are your excellent highly independent sales people. The Agile SCRUM process will be sufficient for all their immediate needs.

The bottom 30% includes new hires and other people who are ramping up slowly into full productivity. Each person who's ranked in this bucket should be assigned a buddy-mentor. It's better for the chances of this person's successful learning and ramping up that this buddy-mentor will be another team member – and not their immediate managers. People learn better from senior peers than they would from their manager.

The middle 50% is the majority of AM's and SE's. All supporting programs – education, training, lunch and learns, repositories of content, etc. should target their needs mainly. These people will improve immensely by the SCRUM process, as it will reinforce all the skills that will help them become more independent, including where to find tools and who to turn to for advice.

The ***Outputs*** from the AM+SE perspective. Here's what they deliver:

The best set of results that you should expect from AM's and SE's includes:

- A closed deal with the best negotiated price
- Opportunity for upsell (deal grows with time) and repeat sales
- Opportunity for wider and deeper penetration in the account
- Agreement to become a reference, speak in conferences, etc.
- Collaboration in creating a case study
- Visibility into the executive level of the customer

These goals should be the focus of the relationship between the immediate managers of the AM's and SE's and their coached subordinates. Selected highlights, especially if they are significant, can be brought up at the SCRUM meeting. Generally, however, the SCRUM meetings should focus on short-term (quarterly) goals.

A highly effective addition to the SCRUM method in sales is the allocation a small but significant portion (min 10%) of the Sales Commission to the achievement of team quota (the regional manager's quota). Team goals tied to individual commission structure will encourage team members to help each other. An award can be given quarterly to the "best team", and with it to encourage a winning attitude and a culture of winners.

To summarize, an extract of teachings from the Agile method is highly applicable to Sales organizations and their productivity. Yes, it is an adjustment from the established organizational structures and hierarchical methods. However, we are continuously talking about having to become more agile because the world of B2B business conduct has changed. We should, therefore, make a significant step toward the Agile method that's more appropriate for a shifting world.

CREDENTIALS: Sought after C-Level Mentor, consultant and speaker, Sarah Zohn is a highly respected expert on Operational Strategies for Growth and Go-To Market for hi-tech companies. She brings broad experience from her positions as VP in mega multinational corporations as well as from coaching dozens of B2B technology companies and guiding them with game-changing strategies. With hundreds of consulting interactions with startups, Sarah also knows well the nature of startups and their ecosystem.
Sarah is a graduate of B.Sc.E.E and MBA from the Technion Institute of Technology in Israel. Her executive level positions at EMC Corporation over 15 years covered hardware and software Engineering, Services and Customer Success, Product Management and Sales. She also served as Deputy Executive Vice President, where she participated at the top of the decision making processes of EMC's leadership. Sarah's experience spans over continents, cultures, several technology- based industries, and hundreds of mentored middle managers and executive leaders.

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