

# A SALES LEADER'S FIRST 90 DAYS

How to Accelerate Your Success in a New Role





The world is continually changing, so we decided to revise and update our popular 2017 series, “A Sales Leaders First 90 Days.” The original blog series and eBook explored how sales leaders can achieve success in the first 90 days of a new role (either with a new team or at a new company).

**The topic was born from a startling statistic: The average tenure of a Sales VP working in the same role at the same company is incredibly brief – only about 18 months.**

So many of our clients had found themselves in a new position, after a relatively short tenure in an old one, that we wondered what we could learn from their experiences that could be put to pragmatic use by sales leaders who are changing jobs.

This book has four brief chapters that together tackle what, in our view, are the **top 90-day challenges** facing sales leaders in a new position:

#### Chapter 1

[Cut Down on Transition Chaos by Onboarding Yourself](#)

#### Chapter 2

[Learn Enough to Achieve Early Wins](#)

#### Chapter 3

[Dig Deep to Set Strategy](#)

#### Chapter 4

[Build a Roadmap to Long-Term Success](#)

## Why You Should Keep Reading

Seasoned professionals may glance at our chapter titles and think “thanks for pointing out the obvious.” But here’s the thing.

Sales is a messy business full of messy human beings, each with his or her own capabilities, expectations, personal goals, learning styles, and political agendas.

Understanding them, harnessing their unique power and avoiding mishaps, some of which will be aimed at you intentionally, is no mean feat – regardless of how much experience you have or the size of the operation you assume.

Whether or not your team makes money for the company rests with you. And you’ll get about one fiscal quarter to prove you can do it to management’s expectations. As [Michael Watkins](#) points out in [The First 90 Days](#):

“

*The first few months is a strong predictor of overall success or failure in the job.*

Michael Watkins, author of *The First 90 Days*.

”

Our goal is to give you practical tools, help you avoid mistakes, and capture more success faster in your first 90 days.

The reason? Early opportunity isn’t always immediately visible. You may be joining in the midst of organizational chaos; you’ll have to make decisions without having enough information; and political and cultural environments take time to understand.

**We have, after all, yet to meet a Sales VP who told us his learning curve was *gradual*.**

## Cut Down on Transition Chaos by Onboarding Yourself

"The top challenge for any sales leader taking on a new role is to cut down on the typical chaos that accompanies the transition to a new role. To do this we suggest spending personal time, well before your first day, to ask for specific information from your new employer. We'll offer a checklist for this a little later.

The temptation to NOT do this as thoroughly as we're recommending is overwhelming. You may be burned out from your old role, planning to take a vacation, moving to a new city, or simply enjoying the opportunity to binge watch all seven seasons of [Game of Thrones](#). Who among us wouldn't.

But there are good reasons for putting in plenty of effort to start learning in advance, and they pay off significantly in cutting down on the initial chaos that creates what we call *the fog of transition*.

Here's how to gather information to onboard yourself, even before your first day:

### Four Ways to Reduce the "Fog of Transition"



#### Surface Any Risk

...related to customers, star performers, revenue retention, impending high-value deals, or employee morale. This also helps you crystalize any immediate mitigation actions you might need to take.



#### Accelerate Your Understanding

...of sales team composition, structure, and financial performance – the three areas you'll make tactical decisions about first.



#### Look for Data Gaps

...that if not filled, will almost certainly add to the fog of transition. Do this by assembling your information and viewing it **holistically**.



#### Arrive on Day 1

...with a list of specific people you want to interview (well beyond your direct reports) and questions you want to ask.



## The "Fog of Transition"

All this effort isn't just a case of getting a jump on your first day to garner credibility (though that's a side benefit). Advanced preparation can avoid serious mistakes that sales leaders are more vulnerable to making in early days **because they don't know what they don't know**, and – being messy human beings – are prone to making more assumptions **when faced with a steep learning curve**.

Michael Watkins refers to these dangerous assumptions as “transition traps.” A little later we're going to examine our point of view on the **six traps** we think are most dangerous to sales leaders taking on a new role.

But first, let's look at an example of one Sales VP who found himself in a difficult situation because he made an eminently reasonable assumption that was wholly incorrect.

---

## The Price of Making Assumptions



John Burns had confidence in his ability to take over sales at his new employer, High Sierra, a maker of backpacks and outdoor-lifestyle luggage. And with good reason. He's a 29-year veteran of the consumer-packaged goods industry.

Two of his first employers were Newell Rubbermaid and The Thompson Company, maker of the WaterSeal brand. Both are well-known for their classical CPG training, and John was fortunate to have benefited from these programs early in his career.

From there he'd gone on to work for companies of varying sizes with varying degrees of formalized process, structure, and sales support. He'd always been successful. This would be his second job in the role of Sales VP and he was looking forward to it.

Yes, he'd be working in a new category with new retailers in channels he wasn't experienced with, but he was ready for that. A meticulous planner with a reputation for keeping cool under pressure, John started studying the luggage category and walking stores where High Sierra products were sold well before his first day.

He used what he learned to ask questions, while still transitioning out of his previous company, to ensure he knew the situation he was walking into. They'd already told him he would need to evaluate his sales team very quickly and make decisions about their ability to drive revenue. Performance, they felt, could be improved, and it was with this expectation that he'd accepted the job.



## The Crucial Pivot Point

Almost immediately it was clear to John he'd have to make significant team changes. No problem. He understood the exact qualities he wanted in high-performing sellers. His years of experience had formed a crystal-clear picture of what a high performer looks like. He gave the profile to HR, handled the attrition meetings with the current staff, and started interviewing.

By day 60, John was in the process of onboarding new team members, but there remained a degree of disorder that made him uncomfortable – not because he doubted his ability to get it under control, but because he felt he was missing something in the larger picture of the business. This is the fog of transition.

He was, frankly, still onboarding himself – learning the categories, establishing internal relationships, and absorbing the culture while simultaneously hiring new team members and constantly travelling to customers.

The pace was fast; it was obstructing his vision and he knew it. Still, he persisted, reasoning that if he could just get the new team members on board, things would settle down and he could step out of the trees to view the forest. Then he would think about longer-term strategy.



*That initial degree of discomfort that makes you feel you're missing something in the larger picture of the business?*

*This is the fog of transition.*





Around day 90, the lightbulb behind John's discomfort came on. In hindsight, it was precisely because of his classical training that he made what turned out to be a dangerous assumption, and thus a major mistake.

In all his years working in consumer products, *brand managers* made the decisions about what products to sell. They made them based on consumer insights, industry trends, competitor activities and the needs of their top retailers. It's typically a highly data-driven process.

**At High Sierra, it was the sellers themselves who needed to initiate new product designs based on needs and requests from their retailers.**

The sellers would then work closely with actual designers to complete them – in effect, giving almost every major retailer exclusive products made only for them. If the sellers *didn't* develop their own products, they had nothing, or little, to sell.

Digging deeper, John now discovered the full breadth of what his sales team was expected to do: Product design, packaging, setups, costing – even occasionally communicating directly to factories in China. This hadn't come up during his interviews, likely because the firm was so used to operating this way it simply hadn't occurred to them that it was out of the ordinary.

John had hired several new sellers, people with excellent sales capabilities, but no experience in product design. Based on how things were run to-date, he appeared to have hired the wrong people.

90 days into his new position, John realized he had inadvertently dried up much of his own product pipeline in some key categories. The all-important back-to-school sales meetings were not that far away.

**What was he going to do?**



## The Recovery

John fell into **two different transition traps** that are common in a sales leader's first 90 days:

- Failing to understand early and fully how sales impacts the **operational aspects** of the business
- Making hiring or attrition decisions based on an **assumption of the seller capabilities** required for the job



*If I could go back in time and do it again, I would have asked management to describe the product development process in detail - from lightbulb to shipping label. Then I would ask how the sales team was involved at every point in this process... what they're responsible for, where they need to give input, how much actual control is in their hands, what the performance expectations are.*



John managed through his first selling season by relying largely on existing product development processes and the few sales team members operating effectively in the current structure. He then started advocating for a brand manager.

He also took steps to start creating a “core” set of product offerings that would be appropriate for multiple retailers and channels. This would vastly cut down on the unsustainably expensive practice of offering so much exclusivity. He never dreamed he'd be setting product strategy. It was not his wheelhouse; yet here he was and the experience took its toll.



*I felt like I couldn't bring anything I'd learned (from previous experience) to the table. It was as if I'd been a football player all my life and you suddenly put a hockey stick in my hand and said, 'go play.'*



What opportunities to drive revenue, increase efficiency, defeat competitors and improve customer relationships had John missed because he fell into a transition trap that took enormous effort to climb out of?

## Six Sales Leader Transition Traps



In our experience, there are **six transition traps** that new sales leaders are in danger of falling into within their first 90 days.

1. Failing to secure your team because you've made assumptions about team morale, commitment and job satisfaction.
2. Misjudging sellers or making hiring/firing decisions based on assumptions about the ideal seller capabilities you think are required to do the job.
3. Setting expectations that you'll grow revenue by a specific percentage on a specific deadline without fully understanding, or more likely *underestimating*, the average sales cycle.
4. Failing to understand expectations for how your sales team should interact with business operations: marketing, product development, pricing, distribution, customer support, etc.
5. Not building the lateral or upper management relationships you'll need to call on politically to "plow the road" when your team encounters internal hurdles to closing deals.
6. Over-estimating your team's capacity to absorb and sustain process changes you intend to implement, particularly those of the "I've always done it this way" variety.

John fell victim to numbers 2 and 4, with serious consequences. **Constant vigilance against making the assumptions associated with these traps is, we believe, the best way to inoculate yourself.**

## Cutting Down on Transition Chaos: Our Recommendation

Our recommendation for sales leaders taking on a new team is to onboard yourself by taking very specific steps to gather pragmatic information that the company should easily be able to provide in advance. If they can't, that in itself should be a red flag.

“

*Leverage the quiet time between roles. You think you'll have time once you start, but you won't.*

- David Cottingham, Vice President of Sales at RF Ideas.

”

### You have three objectives in doing this:

1.

Identify any financial, customer, or employee risk that may need immediate mitigation once you arrive.

2.

Cut down on the fog of transition by getting to the basics in advance: sales team composition (who's who), structure (territory and customer segments), and financial performance. Combine this with other gathered data and look for information gaps. Arrive on Day 1 with a plan for who to interview and what questions to ask.

3.

Be aware of the six sales leader transition traps and recognize where you're vulnerable to falling into one. **We'll continue exploring these traps with experiences from other executives in the chapters that follow.**



## First 90 Days Toolbox: Onboarding Checklist

Use our checklist to request advance information from your new organization. Arrive on Day 1 better prepared to cut down on the *fog of transition*.

### ONBOARDING CHECKLIST: HARD DATA.

Request this information and analyze it before Day 1.

<p><b>1. Team Composition and Structure:</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Org chart (your team including direct reports)</li><li><input type="checkbox"/> Your peer counterparts</li><li><input type="checkbox"/> Names of top performers</li><li><input type="checkbox"/> Anyone passed over for your position</li></ul>	<p><b>What you want to know:</b> Who to set up interviews with starting Day 1.</p>
<p><b>2. Impending High-Value Deals or Customer Risk:</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Top late-stage deal status</li><li><input type="checkbox"/> Risk to forecast, deal closure, or revenue retention</li><li><input type="checkbox"/> Strategic customers exhibiting signs of retention risk</li></ul>	<p><b>What you want to know:</b> What immediate action is needed to either win top opportunities or mitigate revenue or retention risk</p>
<p><b>3. Financial Performance (team, division, business unit):</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> YTD Progress against goal</li><li><input type="checkbox"/> Monthly/quarterly forecast against target</li><li><input type="checkbox"/> 12 to 18-month trend</li></ul>	<p><b>What you want to know:</b> Are you on track to make immediate financial targets, what's the trend driving current performance.</p>
<p><b>4. Funnel and Forecast (3 – 6 months):</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Report from CRM showing state of the sales funnel</li><li><input type="checkbox"/> Sales forecast for the quarter</li><li><input type="checkbox"/> Trends in win rate, funnel coverage, new funnel add</li><li><input type="checkbox"/> Revenue retention rate, etc.</li></ul>	<p><b>What you want to know:</b> Basic health of the sales funnel and forecast. Initial impressions of volume, bookings velocity, funnel coverage and competitive risk.</p>

**Assumptions:** You've already researched basic company information about products, strategy, organization, finances, etc.

In our next chapter, we explore what sales leaders need to do to learn their organizations *well enough* to achieve the early wins that are critical to establishing **credibility** – the armor new leaders need to successfully navigate their first 90 days.

# Learn Enough to Achieve Early Wins

In this chapter, we're going to extend the themes of our onboarding checklist into your initial 30 days (*team, customer, structure, financials*). We'll show you how to learn your new organization *well enough to achieve the early wins that are critical to establishing your credibility*.

## So Far, You Should Have Accomplished...

By this point, you've ideally used the **onboarding checklist** from Chapter 1 to gather and review as much of the specified information as is available before arriving on Day 1.

If you haven't, don't worry. But by all means, continue using the checklist to gather and review the information suggested in it. Any insights you get are your first clues as to where you might be able to achieve early wins.

You should have also set a meeting with management to confirm their business priorities. Keep these priorities in mind when determining where to start focusing your attention in the hunt or early wins.

<b>Trap #1</b>	Failing to secure your team because you've made assumptions about team morale, commitment, and job satisfaction
<b>Trap #2</b>	Misjudging sellers or making hiring/firing decisions based on assumptions about the ideal seller capabilities you <i>think</i> are required to do the job

The remaining four transition traps are important, of course, but **you're more likely to encounter traps 1 and 2 in your first 30 days**.

## Your “First 30 Days” Objectives

In your initial 30 days as a new sales leader, we recommend taking these two actions:

1. Learn your sales organization *well enough* to start making informed decisions
2. Be seen as taking swift action in order to signal personal leadership and to achieve the early wins that will establish your credibility

Yes, we see the conundrum created by this advice too.

We’ve been harping on learning and we’ll continue to do so. But learning your organization fully and deeply takes time. Sometimes a LOT of time, which is likely to include a lot of travel, or alternatively, endless Zoom calls. That doesn’t lend itself to taking swift action that’s *informed*. (*Uninformed* action, on the other hand, is marvelously easy – just not recommended.)

And we do *so want* to take action. It’s human nature, particularly when under scrutiny and time pressure. Taking action makes us appear decisive. It broadcasts the message that we’re in charge and we know what we’re doing.

It can be useful in:

- Raising team morale
- Lowering management anxiety
- Fending off political detractors.

## The Action Imperative

For new sales leaders, however, the temptation to start taking action before understanding their inherited sales situation, what [Michael Watkins](#) calls the **action imperative**, is overwhelming.

We know this because we’ve seen it.

One sales leader, days on the job, demanded we build an overly complicated, highly rigid sales process for his new team without bothering to understand that the laid-back, informal sales culture he’d just inherited would simply not absorb it. Or that his hardline management tactics would likely incite rebellion. The results were predictable.

## “Secure & Get Right”

When sales leaders take over a new team they need to take the time to learn, but they also need to act fast. How to reconcile this dichotomy? Fortunately, we have a solution.

We call it “Secure and Get Right,” or SGR. The SGR method balances a sales leader’s need to learn with her need to be seen taking decisive action – by alternating the two activities. Think of it as a variation on the [Galloway “run walk run” method](#) for marathon training.

Instead of taking action without learning (liable to cause injury to your team) or spending all your time learning without taking any action (liable to cause political injury to you), you work your way through your initial 30 days by alternating these two activities in a structured and prioritized manner.

Let’s walk through it (no pun...).

## The Secure & Get Right Method: Learn While Taking Action

The SGR method has five steps, and it sticks consistently with our ever-important onboarding themes: team, customers, structure, financials.

Here are the steps:

<b>Step 1</b>	Secure the <u>team</u> .
<b>Step 2</b>	Secure the <u>customers</u> .
<b>Step 3</b>	Get the initial <u>structure</u> right.
<b>Step 4</b>	Get the <u>financials</u> right.
<b>Step 5</b>	<u>Get out of the way</u> .

## The Secure & Get Right Method in Action

Jason Barnes is a Sales Vice President with Central Garden and Pet, a \$3.3B consumer packaged goods manufacturer based in Walnut Creek, CA.

Central makes products like grass seed, fertilizer and weed control in its Garden division, where Jason manages a portfolio of several disparate sales teams. He is responsible for all revenue in his division.

Jason has been at Central for well over a decade, but when he became a Sales VP, it was initially for one team only. The additional teams were added gradually. Each has a distinct sales culture and very different customers that cut across a variety of retail channels. There was always a lot to learn.

**And then there was this wrinkle:** Every new sales team added to Jason's portfolio had declining revenues. He was expected to turn these teams around, and he did that by applying the Secure & Get Right method.

Which brings us to an important caveat. SGR as we've described here works beautifully in a turn-around situation. If you've just taken over either a start-up or a high-growth team (or even one that's cruising along just fine), you may not need to perform all these steps and you may not need to do them strictly in order.

In the startup, for example, securing early-adopter customers may need to take precedent over securing the team.

**But sooner or later, every one of these steps is going to be required to get the best performance from your organization.** And if not THIS exact organization, then the one you'll have 18 months from now. So we're using a turnaround example as the best way to illustrate the method.



## Step 1: Secure the Team

When Jason assumed management of the team dedicated to Central's third largest retail customer, revenues were at a staggering 10-year low. Morale was, if anything, lower. But the team had real talent. Jason knew this. So in his first 30 days he needed to **secure the team** to:

- Ensure he didn't lose this talent (**early win #1**)
- Dig deeper into the team's morale concerns and individual capabilities (**learning #1**)
- Figure out how to raise morale (**early win #2**)

**Run, walk, run.**

If he couldn't sort out the morale issue, no amount of effort would produce a high-performing team. And he absolutely couldn't afford to lose the talent. His new sellers had deeply technical product expertise that would be difficult to replace. Fortunately, the morale and retention issues were linked.



*The first thing I did was sit down with every person on the team, direct report or not, and asked them 'how's it going'?*



He learned one reason morale lagged was that the team felt their considerable expertise wasn't being fully used and that the customer had been kept at a distance from them by his predecessor.

**So, Jason immediately upgraded titles for most team members, and added more responsibility to each of their roles.** His goal was to ensure they felt valued for being the experts they are. The effect was immediate.

“

*It was like watering a nearly dead flower; everybody perked right up because they were suddenly empowered to do their jobs.*

”

Jason also used the interviews as a way to begin “**sorting**” the **capabilities** of individual team members:

	What strengths and weaknesses did each have?
	How could they complement each other?
	What were the implications for any structural changes?
	Did anyone need new skills?
	Did the team need enabling tools?

These were learnings he filed away for later use (and which we will discuss again in Ch. 3). He also knew he hadn’t even *begun* to get to the bottom of the financial performance issues.

**What’s more, if the team felt the customer was being kept at a distance, the customer probably felt that way too.** In fact, he already knew they did. He’d had breakfast that morning with the Merchandising VP, the most senior executive with whom Central did business at this customer.



## Step 2: Secure the Customer



*If there are customer relationship issues to address, do it immediately. Rip the band-aid off.*



At breakfast that morning with the Merchandising VP, Jason took the opportunity to be candid. “Look, Central has lost its way.” Fulfillment issues were at least partly responsible for the team’s financial decline. Grass seed and fertilizer, among other products, weren’t getting into the customer’s distribution centers at the rate they should, which means they weren’t available for the retailer to sell. But the reasons for *why* this was happening weren’t transparent to the Merchandising VP.

### Customers don’t like being in the dark.

Clearly the situation called for higher collaboration and immediate operational transparency. To address these, Jason decided to concentrate on operational basics: product fill rate and on-time order delivery, the bread and butter of the manufacturer/retailer relationship.

So in his first 30 days, Jason needed to secure the customer by:

- Being transparent with them on product fill rate and on-time delivery status (early win #3)
- Digging into the cause of the fulfillment issues to determine how to fix them (learning #2)
- Constantly keeping the customer apprised of improvements as one way to begin repairing the relationship (early win #4)

### Run, walk, run.

By now you’ve detected the pattern for prioritizing learnings and actions to achieve early wins. It would be even better if you had a set of criteria to help you choose which early wins would have the most impact AND the best chance of succeeding. So, we’ve built a decision table to do this and added space to note the learnings and actions required for proper execution. See the 90-Days Toolbox at the end of the chapter.



## Step 3: Get the Initial Structure Right

Once you've secured both your team and customers, use what you've learned so far to start getting the team structure right:

Do what, according to [Marcus Buckingham](#), great managers do: Find the unique talent of each individual on the team and leverage it to full advantage. (Certainly other circumstances, like cost of sales due to inefficient territory coverage can necessitate a structure change, but this is likely a longer-term effort vs. a truly early win.)

Jason discovered that some of the team's fulfillment issues were caused because sellers were spending half their time on internal process requests, including forecasting. It was terribly inefficient.

So he changed the structure by dedicating a resource to help sellers get the necessary information and assist with forecasting. This way, sellers concentrated on selling, forecasting became more consistent because it was handled by one person, and fulfillment could start to improve.



*Get people into the right jobs or adjust their responsibilities to fit their talent. Use every tool available to you. I'm a huge fan of [Birkman](#) because it allows me to talk to people in the way they best absorb information.*



**We want to stress here that any structure or organizational changes you make at this point should be grounded in what you know for sure.**

Be careful when considering radical changes to structure before you truly understand your new organization. You may later find yourself in the position of reversing what was likely an expensive and disruptive decision.

This happened to one of our clients who moved a 100-person sales team (which entailed interviewing, rehiring, onboarding and considerable training) from one operating division to another. Twelve months later, they moved them right back. The move had been ill-considered and was seriously driving up the cost of sales.



## Step 4: Get the Financials Right

Let's recognize a couple of things about financials. First, they might not wait for you to secure your team and customers. Second, nearly everything having to do with sales has an impact on financials. We hate using a cliché, but this is one place where you must pursue low-hanging fruit.

Jason knew fill rates and on-time deliveries were key to ultimately getting more product on the shelf so consumers could buy it. That's certainly a more clear-cut task than improving revenue by changing product formulas or launching a new marketing campaign.

If you work in, say, discrete manufacturing or technology services, and your average sales cycle is 9 to 12 months, you will not be improving revenue in 30 days. **So make sure whatever financial commitments you make to management are realistic.**



## Step 5: Get Out of the Way

Jason's advice after securing team and customers, then getting structure and financials right, is this: **get out of the way**. He doesn't micromanage, though neither does he keep his hands out of the field because knowing what's going on in his ecosystem is critical. Pre-covid, this was his normal interaction pattern:



*I travel to be with my teams about 75% of the time to get as much first person observation as possible. Then my goal is to coach my direct reports to coach THEIR people.*



At this point, using SGR, you will have created an environment for *initial* success. Of course, it will need refining. In the next chapter, for example, we'll be assessing whether the team has the skills and tools they need to properly do their jobs.

You may find as you continue to learn that additional structure or role changes are required. New processes or technology may be in order. You will be assessing all of this in the next 30-60 days.

But for now, using SGR, your team should be able to achieve an operational rhythm that allows you to now move forward and begin determining longer-term strategy. Don't forget to set a regular management cadence with direct reports to keep the operational rhythm consistent.

## Conclusion

Clearly the steps you take in your initial 30 days to learn your organization *well enough*, while acting decisively to achieve early wins, are highly situational. Our Secure and Get Right method and the "early win" decision grid (next page) will add efficiency and thoughtfulness to these efforts.



## First 90 Days Toolbox: Choosing & Prioritizing Early Wins

We like the following grid for determining early win candidates because it calls out your true reasons for choosing them. Is it just to make you look good? Or will it have a real effect on the sales team, company or customers. A second grid to help you alternate between learning and action is next.

### Early Wins Decision Grid

Early Win Candidate #1:				
Aligned with Mgmt Priorities? (Y/N)	Ease & Speed Scale of 1 - 5 5 = Easy/Fastest	Benefits to Team/Company	Benefits to Customer	Benefits to Me
Early Win Candidate #2:				
Aligned with Mgmt Priorities? (Y/N)	Ease & Speed Scale of 1 - 5 5 = Easy/Fastest	Benefits to Team/Company	Benefits to Customer	Benefits to Me
Early Win Candidate #3:				
Aligned with Mgmt Priorities? (Y/N)	Ease & Speed Scale of 1 - 5 5 = Easy/Fastest	Benefits to Team/Company	Benefits to Customer	Benefits to Me

This grid also helps us be realistic about the ease and speed with which we can likely achieve an early win. If you tend to be aggressive in estimating how much you can actually accomplish in a short time period, this grid acts as a reality check.

Once we've chosen our top three early win priorities, we can plan for both the learnings we want to gain and the actions we want to take based on those learnings. The following grid helps us do that.

## Early Win Candidate: Learn & Take Action Plan

Win #1	Learning 1	Learning 2	Action 1	Action 2
	Due Date:			
Win #2	Learning 1	Learning 2	Action 1	Action 2
	Due Date:			
Win #3	Learning 1	Learning 2	Action 1	Action 2
	Due Date:			

In our next chapter, you will continue your learning efforts to obtain an even deeper understanding of your organization and the capabilities of your team, which you'll use later to formulate longer-term strategy.

You'll also begin building relationships with key influencers in the organization, many of whom head groups that your sales team requires for support.

# Dig Deep to Set Strategy

In this chapter, we'll use a formal discovery process to dig deep into your sales organization so you can systematically surface the knowledge you need to determine longer-term strategy. We'll also use this discovery process to **understand the all-important political and cultural landscape.**

Finally, we'll begin **building relationships with key influencers** whom you will, sooner or later, have to rely on to ensure your team's success.

## So Far, You Should Have Accomplished...

By day 30, you should have accomplished the following:

- Ideally onboarded yourself and learned your new organization *well enough* to take whatever decisive action is needed to net you the early wins critical to establishing your credibility.
- Confirmed (and reconfirmed) management's business priorities.
- Used the Secure & Get Right (SGR) method to:
  - Secure your team by guarding against the **loss of high performers**
  - Secure any at-risk customers from **defecting to competitors**
  - Take initial steps to get your organizational structure right, at least for the short term
  - Start getting your financials right (whether that means turning them around, continuing their growth, keeping them steady, or ignoring them in favor of gaining new customers)

“

*This deep information, needed to fully understand your sales organization, comes only from asking questions – a lot of them.*

”

## Transition Trap BOLO: Traps 3, 4 and 5

In days 30-60, be on the lookout specifically for transition traps 3, 4 and 5. The other traps are important, of course, but you're more likely to encounter these in your second month on the job.

<b>Trap #3</b>	Setting expectations that you'll grow revenue by a specific percentage on a specific deadline without fully understanding, or more likely underestimating, the average sales cycle.
<b>Trap #4</b>	Failing to understand expectations for how your sales team should interact with business operations, including marketing, product development, pricing, distribution, customer support, etc.
<b>Trap #5</b>	Not building the lateral or upper management relationships you'll need to call on politically to "plow the road" when your team encounters internal hurdles to closing deals.

## It's Time to Dig Deep

If you've read Chapters 1 and 2, you are by now inured to our constant drumbeat of gathering information and learning. But so far we've advocated obtaining specific information at a semi-shallow level of detail because your first 30 days also demand decisive action, and there are only so many hours in a day.

But it's now time to dig deep. You're going to need to gather more information in order to define a longer-term strategy. **You must also grasp the political and cultural aspects of your organization – ignore them at your peril.**

## Do Your Own Discovery

To do all this requires an extensive and systematic discovery effort. This isn't the type of activity you can do from your office. So far we've advocated gathering information that can mostly be gleaned from reports, presentations, or charts and other documents.

You've only been on board for 30 days and this type of information gathering is expedient. The data is pre-built and ready-made for consumption. But the deeper information you need to fully understand your sales organization comes only from asking questions. A lot of them.

You may, depending on the span of your responsibilities, need to delegate some of this effort. We, however, are big believers in having sales leaders roll up their sleeves and do as much discovery as possible for themselves.

First and foremost, you can't learn the political or cultural landscape if you delegate discovery to others. You'll hear nuances and patterns of knowledge that will help you distinguish between what's important and what's nice to know.

This discovery effort also allows you to continually refine your facts, so you can consciously test whether you've reached truth or whether you're inadvertently making decisions based on erroneous assumptions.

## The Payoff is Political

But there's another reason to do your own discovery. You'll get an excellent payoff in visibility with your peers and upper management, which is crucial to succeeding in your first 90 days. As a sales leader you'll be under a microscope. In the absence of personal access to you, people will simply fill in the gaps with what they hear from others.

**Take this opportunity to control your own first impression.**

That, however, pales in comparison to the credibility you'll gain with the people you manage. And please, drive your discovery effort well beyond your direct reports. If that means townhall-style meetings and a month of Zoom calls or travel, do it.

**You have a short window to use your relative ignorance for political advantage. Do not waste it. You will never be the new guy again.**

## Your Objectives for Days 30 - 60

These then are your recommended objectives for the next 30 days (days 30 – 60).

Dig deep into your sales organization so you can determine longer-term strategy.

Leave your office and conduct a systematic discovery effort yourself, if your role allows (if not delegate *carefully*).

Identify the influencers you'll need to ensure your team's future success; begin building relationships with them.

Use your discovery efforts to gain political advantage with peers and upper management by being visible and asking intelligent questions.

Also, establish credibility with your team by listening to their concerns and determining when and how you will act.

## Conducting Discovery: To Be Systematic, Use Our Question Bank

We've built our First 90 Days Question Bank with a deliberate eye toward developing longer-term strategy. Therefore, our discovery questions fall into one of four buckets:

- Strategy & Structure
- People & Enablement
- Process & Tools
- Metrics & Management

These buckets cover off all sales management areas. Keep in mind there are **SOME** aspects of these areas that can be gleaned from reports, as we've mentioned (e.g., territory coverage, win/loss ratio, other funnel metrics, compensation structures, etc.). Much of this we suggested you get through during onboarding. See Onboarding Checklist in Chapter 1.

**To dig deep, however, we focus our questions on the knowledge that cannot be gleaned from reports, but rather requires human interaction. We've highlighted the questions we consider most important on the next page.**

# Deep Discovery Question Bank

## Strategy & Structure

1. How strategic/strong are our customer relationships?. Do they see us as strategic partners or vendors? What's the relationship (by segment) that we SHOULD be having.
2. What's the biggest challenge in the sales org today? What's the cause? What's preventing us from addressing it?
3. What's the biggest opportunity in sales that we aren't exploiting today? What's it worth to us? What's preventing us from pursuing it?
4. When we win a deal, why do we win? What do customers say about why they selected us? What differentiates us from our competitors?
5. When we lose a deal, why do we lose? What do customers say about why they did not select us (beyond price)?
6. To sellers or front-line managers, "If you were me, what would you focus on first?"

## Process & Tools

1. How standard is our sales process? Is it custom to our specific group? Or standard across the company?
2. How disciplined are the sales team and front-line managers at executing the sales process consistently?
3. What's the inventory of available sales tools? (digital/mobile/other). How well do they work? What else do we need to be effective?
4. What critical support do we need from peripheral groups? (Marketing, sales ops, pricing, inside sales, proposal management, etc.) Why specifically, and do we need to solve for service gaps or collaboration issues?
5. What CRM are we using? Are there multiple instances? How disciplined are we at using it to track deal flow? Can we see one view of the customer?

## People & Enablement

1. How clear are the roles and responsibilities of every member of the sales organization? How effectively do they collaborate to win?
2. Does the sales team have the right skills? If not, what skills need to be improved and why?
3. How well do we articulate the business value of our offerings to customers? How well do we use data and insights to show proof of that value?
4. Who are the best sellers in the organization? What do they do differently from everyone else?
5. What additional support do sellers need to win? Is there anything they should STOP, START, or CONTINUE doing?
6. Tell me about the best day you ever had in your position. Tell me about the worst day (to surface information you didn't know to ask).

## Metrics & Management

1. Do we have clear performance metrics (leading and lagging).
2. Does the team know what the KPIs are and how their actions affect them?
3. Do sellers know the overall performance of the sales organization at any given time?
4. Are we pursuing the right mix of new customer acquisition and current customer expansion to maximize revenue or strategic advantage?
5. Do front-line managers have a consistent cadence with their team to their concerns drive performance and personal development?
6. Did they have a consistent cadence with my predecessor? What was it?

### Our recommended process for using the question bank effectively:

1. Choose your questions (augment with your own)
2. Determine who you want to talk to, schedule and conduct the interviews
3. Combine your findings with the hard data from reports
4. View your combined information holistically so you can clearly see where opportunity or issues exist
5. Start prioritizing your objectives; early wins first.

## When Things Don't Go Smoothly

Candice Sherman ran a text-book effort to do much of what we've discussed so far (from onboarding to SGR, to digging deep in order to set strategy) when her employer, communications and cloud services company [Unify](#), was acquired by [Atos](#), an €11.7B behemoth 10 times the size of Unify and based in [Bezons, France](#).

Suddenly under new management and engulfed in a very different culture, Candice found herself alone with little direction from the new company other than to instruct her sales team to not only keep selling their current line, but to **start selling an entirely “new bag,”** which included cyber security, big data and consulting service – areas where her team had little expertise.

Candice wanted to make a plan to understand the new company, get aligned with management objectives and start forming relationships with her peers and influencers on the Atos side. But the opportunities turned out to be limited. She couldn't get much access to her new employers.

It seemed she was going to have to keep morale and her team together (and prevent attrition) on her own, somewhat blindly, at least in the short-term.

Absent clear guidance, she developed a vision for sales strategy and team operations on her own, but struggled to find an audience for it with Atos management. “It wasn't that they didn't care, they just had bigger fish to fry.” Certainly a common situation for companies in the throes of a post-merger integration.

## In the Absence of Clear Direction, Rely on Yourself

So Candice decided to execute an “I’ll do this until someone tells me to stop” management strategy. There was no budget to bring her team together to educate them in person, so she put her strategy in motion virtually with “lunch and learns.”

She spent time re-evaluating her sellers’ skills to understand who would be successful selling the new bag and who might need coaching.

She also held frequent cadence calls to ensure her team felt supported. Constant communication, she felt, was the key ingredient in her ability to keep the entire team together with almost no attrition for a full year after the acquisition. **Then Candice ran into a major organizational alignment issue, which we’ll get to in a minute.**

## What is Organizational Alignment?

We haven’t talked much about organizational alignment (or misalignment as the case may be), though we will discuss it extensively in the next chapter.

*Misalignment* occurs when one part of the sales organization creates friction or *drag* on another part. Drag might keep you from executing faster or it might lower your sales effectiveness, negatively impact revenues, drive costs up, drive morale down, trigger attrition or prevent you from hiring quality candidates.

A classic case of misalignment occurs when the sales team is offered incentive compensation that drives behavior contrary to the actual goals of management. It’s often a result of the left hand not knowing what the right hand is doing – and this is what happened to Candice.

## The Misalignment Surprise

The misalignment surprise hit when Candice received an updated compensation structure from Atos that incentivized making the sale (i.e., getting a contract signature), as many sales comp plans do. Unfortunately, she also received a directive from management to achieve quicker growth in recognized revenue (when revenue is earned from an accounting standpoint vs. when the sale is made). Management would now be emphasizing recognized revenue (not the sale itself) as a critical KPI.

The result? Sellers were getting paid when the sale was made, but no one had any incentive to drive the pace of product or services delivery so revenue could be recognized (that is, earned), faster.

As at most companies, there tended to be a lag between the sale, or contract agreement, and when revenue could legally be recognized by the company. And unfortunately, Unify's products and services tended to have an even longer revenue recognition cycle than Atos's core services.

**Sales compensation was driving behavior that was contrary to management's stated objectives.** The situation was frustrating, but there was no point in getting ruffled. Candice brought the misalignment to management's attention and asked, "What would you like me to do differently?"

“

*You've been heard. I understand, and I will run that up the chain of command.*

”

## When Drag Drives Attrition

Candice certainly had enormous respect for the leadership team at Atos. "They are truly brilliant and I'm confident they'll continue to execute their digital transformation strategy at high levels." But ultimately she elected to leave, having decided her preferences for managing her business were out of sync with the Atos management's style and company culture.

Still, she took away valuable lessons in maintaining her credibility with her team. "I (kept) an open forum where they could share their frustrations." And she let them know, "you've been heard, I understand, I will run that up the chain of command." She might not be able to guarantee action, but that kind of honesty earned her their loyalty.

## Identify Influencers: Who Do You Need in Order to Succeed?

Whether Candice would have benefited over time from stronger relationships with the influencers from her acquiring company, we cannot say. Given the post-merger distractions at Atos, she did her best to make lemonade.

Her circumstances aside, we are strong advocates of making a deliberate plan to identify and schedule the time to build relationships with the influencers who have the ability to “plow the road” for your sales team.

What groups does your team rely on to drive a deal forward: Solution experts? Pricing strategists? Customer marketers? Product managers? Supply chain operations? Customer care? Who heads these teams and what do you know about their management priorities and incentives?

Sooner or later you’re going to need their assistance to close a major deal or to retain a critical customer.

## Therefore, We Have This Suggestion

Do what [Rosalinde Torres](#) suggests and anticipate what you’ll need from which influencers, then take steps to nurture these relationships. Your current preparedness on this front, she suggests, is reflected right in your Outlook calendar. “Who are you spending time with, on what topics? Where are you travelling?”

Look at your calendar. Do you have meetings with key influencers (or customers) on it? If not, figure out who you need to have strong relationships with and schedule those meetings. **Do it now. This isn’t a matter of being social, it’s a matter of risk mitigation.**

### Conclusion

Digging deep is a time consuming, sometimes strenuous, effort that many sales leaders are tempted to give less consideration to than is prudent.

Occasionally they’re uncomfortable with the sheer volume of personal interaction required for this task. If you find yourself in this situation, find delegates to help you and remember two of [Michael Watkins](#) central tenets for working systematically through your first 90 days:

**First, small actions taken now have a huge impact later. And second, failure to create momentum in the first 90 days virtually guarantees an uphill battle for the rest of your tenure.**



# First 90 Days Toolbox: Question Bank

**Question Bank for Deep Discovery (page 28)** into the workings of your sales organization and your company’s culture and political landscape. Choose which questions apply to your situation, decide whom you need to interview and get out from behind your desk.

In our final chapter, we’ll show you how to organize your key learnings and use them to build a roadmap that defines a longer-term sales strategy. In this roadmap, you’ll make a plan to:

- Achieve financial and strategic objectives
- Heal alignment issues like the one experienced by Candice Sherman at Atos.

Deep Discovery Question Bank	
Strategy & Structure	Process & Tools
<ol style="list-style-type: none"> <li>1. How strategic/strong are our customer relationships?. Do they see us as strategic partners or vendors? What’s the relationship (by segment) that we SHOULD be having.</li> <li>2. What’s the biggest challenge in the sales org today? What’s the cause? What’s preventing us from addressing it?</li> <li>3. What’s the biggest opportunity in sales that we aren’t exploiting today? What’s it worth to us? What’s preventing us from pursuing it?</li> <li>4. When we win a deal, why do we win? What do customers say about why they selected us? What differentiates us from our competitors?</li> <li>5. When we lose a deal, why do we lose? What do customers say about why they did not select us (beyond price)?</li> <li>6. To sellers or front-line managers, “If you were me, what would you focus on first?”</li> </ol>	<ol style="list-style-type: none"> <li>1. How standard is our sales process? Is it custom to our specific group? Or standard across the company?</li> <li>2. How disciplined are the sales team and front-line managers at executing the sales process consistently?</li> <li>3. What’s the inventory of available sales tools? (digital/mobile/other). How well do they work? What else do we need to be effective?</li> <li>4. What critical support do we need from peripheral groups? (Marketing, sales ops, pricing, inside sales, proposal management, etc.) Why specifically, and do we need to solve for service gaps or collaboration issues?</li> <li>5. What CRM are we using? Are there multiple instances? How disciplined are we at using it to track deal flow? Can we see one view of the customer?</li> </ol>
People & Enablement	Metrics & Management
<ol style="list-style-type: none"> <li>1. How clear are the roles and responsibilities of every member of the sales organization? How effectively do they collaborate to win?</li> <li>2. Does the sales team have the right skills? If not, what skills need to be improved and why?</li> <li>3. How well do we articulate the business value of our offerings to customers? How well do we use data and insights to show proof of that value?</li> <li>4. Who are the best sellers in the organization? What do they do differently from everyone else?</li> <li>5. What additional support do sellers need to win? Is there anything they should STOP, START, or CONTINUE doing?</li> <li>6. Tell me about the best day you ever had in your position. Tell me about the worst day (to surface information you didn’t know to ask).</li> </ol>	<ol style="list-style-type: none"> <li>1. Do we have clear performance metrics (leading and lagging).</li> <li>2. Does the team know what the KPIs are and how their actions affect them?</li> <li>3. Do sellers know the overall performance of the sales organization at any given time?</li> <li>4. Are we pursuing the right mix of new customer acquisition and current customer expansion to maximize revenue or strategic advantage?</li> <li>5. Do front-line managers have a consistent cadence with their team to their concerns drive performance and personal development?</li> <li>6. Did they have a consistent cadence with my predecessor? What was it?</li> </ol>

# Build a Roadmap for Long-Term Success

In this, our final chapter, we'll show you how to organize the considerable information you've gathered, actively look for major alignment issues, and build a roadmap that sets longer-term sales strategy. To review what we've discussed up to now:

- **Chapter 1** tackled onboarding yourself with your new company and offered strategies for cutting through what we call the **fog of transition**.
- **Chapter 2** offered concrete steps for **balancing the need to learn** with the need to take quick **action** to achieve early wins. We call this our “Secure & Get Right” method (days 1-30).
- **Chapter 3** showed you how to **dig deep** into the sales organization so you can systematically surface the knowledge you need to determine longer-term strategy. We also gave you a brief introduction to a typical “alignment issue.” (days 30-60).

## So Far: You Should Have Accomplished...

By day 60 in your new role, you should have done the following:

- Taken all necessary steps to secure your team, secure your customers and get the initial structure and financials right.
- Achieved early wins in order to established firm credibility with your management, peers and direct reports.
- Conducted an extensive discovery effort to thoroughly understand your organization, including:
  - People/Processes
  - Technologies
  - Financials
  - Management's objectives or initiatives
  - Culture
  - Risk
- Crystallized the business situation you've inherited (start-up, turnaround, mandate to grow or maintain status quo) well enough that you generally understand where the opportunities lie and what might need fixing.
- Be well on your way to establishing political alliances and cultivating relationships with influencers who will be instrumental to your future success and that of your team.

## Transition Trap BOLO: Trap #6

During the last month of your first 90 days, be on the lookout specifically for transition trap #6:

### Trap #6

Over-estimating your team's capacity to absorb and sustain any changes you intend to make, particularly those of the "I've always done it this way" variety.

The other transition traps are important, of course, but you're more likely to encounter this one as you begin implementing your longer-term strategy.

## Your Objectives for Days 60 - 90

For your final 30 days, we recommend taking these four actions:

1. Organize all learnings to date and review them: **What do you see?**
2. Identify major alignment issues: **We'll show you how**
3. Determine and prioritize longer-term objectives
4. Build a sales strategy roadmap to achieve long-term objectives and heal major alignment issues

## Organize Your Learnings to Surface Potential Roadmap Objectives

The theme that threads its way through all four of our blog posts and every single one of your first 90 days is *learning*.

We've asked you to gather an enormous amount of information, so let's talk about how to organize it to make sure you can both **see the big picture** and **build a sound sales strategy** that minimizes the need to rely on assumptions.

But first, let's summarize our information gathering effort so far.

When	Why	What
<p><b>Before Day 1</b></p>	<p><b>Onboard yourself.</b></p>	<p>Reports, charts, spreadsheets, presentations, etc. that can be requested in advance so you can assess the situation you will inherit.</p> <p><u>Onboarding Checklist</u> categorized by: <b>team, structure, customer, financials and risk</b></p>
<p><b>By Day 30</b></p>	<p><b>Learn organization well enough to achieve early wins.</b></p>	<p>Analyze onboarding information, conduct initial interviews, fix information gaps.</p> <p><u>Early Win Candidates Decision Grid</u> to identify which early wins to pursue related to <b>team, structure, customer, financials or risk</b></p>
<p><b>By Day 60</b></p>	<p><b>Dig deep into the organization to get information needed to set long-term sales strategy.</b></p>	<p>Extensive interviews designed to gather a deep understanding of your sales organization by obtaining information unavailable in reports, charts, spreadsheets, etc.</p> <p><u>Question Bank</u> categorized interview results according to these four areas: <b>strategy/structure, process/technology, people/enablement, management/coaching</b></p>
<p><b>By Day 90</b> (discussion to follow)</p>	<p><b>Build a strategy roadmap.</b></p>	<p>Assess alignment issues and prioritize strategic and financial objectives in order to build sales strategy roadmap</p> <p><u>Sales Organization Alignment Checklist</u> categorizes alignment issues according to these four areas: <b>strategy/structure, process/technology, people/enablement, management/coaching</b></p>

As you can see, there are commonalities for categorizing your learnings. We suggest you combine them and **organize all of your First 90 Days discovery information into the following areas:**

- Strategy & structure
- Process & tools
- People & enablement
- Management & coaching
- Financials & Risk

So, let's get tactical on how to do that.

**1.**

**Choose a technology medium you're comfortable with, then stick to it.** Go low tech and use a spreadsheet with five tabs labelled as we've suggested above. Or use more free-form technologies like [Evernote](#).

- Ask to have one assigned to you
- Beg, borrow or steal this expertise from another executive
- Hire a consultant with a sufficiently sophisticated sales background
- Outsource to a capable gig economy worker from a reputable firm such as [Catalan](#) (what [CEB](#) describes as Uber, but with MBAs instead of cars).
- Find a member of your own sales team with the right capabilities and give them the temporary assignment (without risking deals or customers, obviously)

**2.**

**Delegate the sorting, summarizing and analyzing to a strategy assistant with the capability to understand what he's looking at.** Don't have one? Here are five suggestions for getting one:

**3.**

**Use the tools we've offered throughout this entire book to draw conclusions that will naturally lead to a list of potential roadmap objectives.** Keep a running list of objectives and continually prioritize them as you analyze your learnings. That makes building your roadmap easier.

Way back when we published our first post in this series, we cautioned that you'd likely experience an overwhelming temptation to NOT be as rigorous as we recommend in your learning effort. Skimp on this activity and you may not be able to recover from the inevitable mistakes.

**So we urge you delegate where practical, but do not back away from the heavy lifting when it's not.**

## **Moving onto Alignment: What's the Big Deal?**

Alignment is important, so let's define it. Any misalignment between moving parts in your sales organization creates drag which can result in anything from mild annoyance (unnecessary meetings) to real harm (lower revenues because compensation is incentivizing the wrong behavior).

**You control the engines of revenue for the company, so any alignment issue that affects the sales organization is potentially affecting the company's ability to make money efficiently.**

Candice Freeman discovered as much when, after being acquired, her new company's management simultaneously handed her a) a mandate to obtain *recognized revenue* faster and b) a compensation structure that, instead, rewarded sellers for getting contract signatures – a misalignment between sales objectives and seller behavior that produced an undesirable result.

## **When Alignment Bows to Competitive or Financial Pressure**

Sometimes misalignment occurs when a well-intentioned go-to-market strategy falls victim to the pressures of having to hit a sales quota. Here the misalignment is not overtly stated or part of an official policy. Instead, sellers observe misalignment behavior in the ranking sales leader and tacitly agree to perpetuate it.

Say your go-to-market strategy is grounded in delivering a **superior customer experience**. But the current reality includes revenue shortfalls, cost over-runs and a Sales VP who's harping on close rates and travel expenses. Every seller knows the quickest, cheapest route to a contract signature is a transactional sale that all but ignores the customer experience. So, some will take it, no matter what the official go-to-market strategy is.

**Anyone who's been in sales longer than 5 minutes has experienced this situation.**

# Identify Alignment Issues Using the Sales Alignment Matrix

How then do you identify alignment issues and decide which ones will become objectives in your sales strategy roadmap? By using our Sales Organization Alignment Checklist below, which helps you identify alignment issues that might reduce sales, increase costs, cause attrition or hinder ability to hire talent.

Once you've identified areas of misalignment, rank their importance based on stated mandates, initiatives or objectives from your management.

## SALES ORGANIZATION ALIGNMENT CHECKLIST

### STRATEGY & STRUCTURE ALIGNMENT

- ✓ Management's goals & objectives are aligned with go-to-market strategy.
- ✓ Organizational structure has the right roles, responsibilities and reporting lines to execute go-to-market strategy.
- ✓ Account coverage is optimized for high-potential markets and customers
- ✓ Sales resources are appropriately aligned to high-potential markets and customers

### PROCESS & TECHNOLOGY ALIGNMENT

- ✓ Sales process is appropriate for and properly reflects our stated go-to-market strategy
- ✓ Sellers understand the sales process and execute it with discipline
- ✓ Sales tools truly enable sellers to advance the sale and they use them consistently
- ✓ Sales tools truly enable front-line managers to better manage their teams and their account portfolios



### MANAGEMENT & COACHING ALIGNMENT

- ✓ Managers understand the sales organization's goals & objectives and can manage/coach to achieve these results
- ✓ Managers can develop capabilities of individual sellers
- ✓ Managers recognize and reward properly to keep sellers motivated and retain star performers

### PEOPLE & ENABLEMENT ALIGNMENT

- ✓ Sales team understands go-to-market strategy and their specific responsibilities in executing it
- ✓ Sellers in different roles clearly understand how and when to collaborate to execute the sales process
- ✓ Sales metrics are appropriate for measuring seller progress toward goals
- ✓ Compensation structure incentivizes behavior that will achieve goals

## Let's Look at an Example

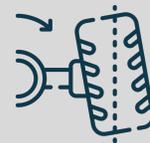
The first item on our tool under **Strategy & Structure** (upper left corner) is “**Management’s overall goals & objectives are aligned with go-to-market strategy.**”

A classic misalignment for this item looks like this:



### Situation

Your sales process “rules of engagement” state that sales resources from different business units must collaborate on a single solution design and show one face to the customer through a designated account manager.



### Misalignment

Front-line sales managers are instead instructing teams to close deals quickly by any means necessary, which incites rogue selling behavior within the BUs.



### Result

Customers, now dealing with multiple independent sellers, declare you too difficult to work with; some threaten to defect.



### Potential Roadmap Objective

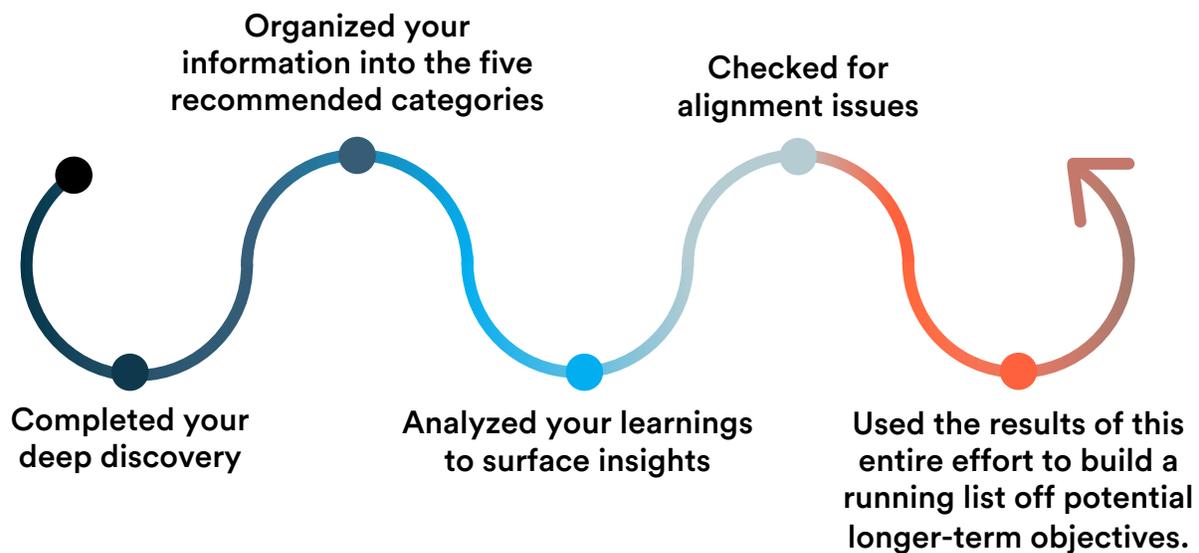
Rectify misalignment between front-line manager instructions to sales team and the stated “rules of engagement.”

Review sales process to ensure it truly drives collaboration. If it doesn’t, this is another misalignment.

You get the idea. We suggest starting with **Strategy & Structure** and working your way clockwise around the grid to identify major alignment issues that you have the power to correct.

## Building a Roadmap for Longer-Term Sales Strategy

You've spent weeks preparing for this moment, and now it's time to build your longer-term sales strategy. Let's summarize what you've ideally accomplished in your 90-day journey:



Now it's time to narrow your potential objectives down to three or four and prioritize them. Next, we'll use this prioritized objectives list to populate our Sales Strategy Roadmap template shown below.

### Sales Strategy Roadmap Template (repeat for each objective)

<b>OBJECTIVE 1</b>	
<b>Description:</b>	
<b>Time Frame / Due Date:</b>	<b>Success Metrics:</b>
<b>Strategy &amp; Structure:</b>	
<b>Process &amp; Technology:</b>	
<b>People &amp; Enablement:</b>	
<b>Management &amp; Coaching:</b>	

After that, you're first 90 days are up and it's time to start executing your roadmap.

If all this seems a little too neat and tidy for the amount of chaos you expect to contend with well beyond your first 90 days, it might be. But without a plan you'll just be reacting to whatever piece of your sales organization is on fire that day – and that won't drive results.

Besides, we know setting sales strategy and actually sticking to its execution is possible. We've seen our clients do it. One Sales VP we've worked with was so committed to his sales strategy that he encased his roadmap in plastic and carried it around with him. If an executive were to ask about his business, he could explain his strategy and current progress against objectives in real time. (He's a division president now).

You'll notice our **Sales Strategy Roadmap template** is relatively simple with only four key areas to populate:

1. Your objective
2. Time frame for achieving it
3. Metrics you'll use to measure whether you were successful
4. Strategies (the high-level “how”) you'll use to get it done

Notice that “strategies” are broken down into familiar categories on the template. This ensures you cover all your “how-to” bases and prevents you from having a plan that's long on ambition and vague on detail.

## Conclusion

We hope you've enjoyed our e-book on a Sales Leader's First 90 Days. Following our method, using our tools and, above all, putting in the recommended effort to learn will help you avoid mistakes and reduce your time to growth.



## FIRST 90 DAYS TOOLBOX: Sales Organization Alignment Checklist

Use this checklist (page 39) to identify and prioritize alignment issues that can cause drag on your sales organization. Any that are serious enough become improvement objectives for your Sales Strategy Roadmap.

### SALES ORGANIZATION ALIGNMENT CHECKLIST

#### STRATEGY & STRUCTURE ALIGNMENT

- ✓ Management's goals & objectives are aligned with go-to-market strategy.
- ✓ Organizational structure has the right roles, responsibilities and reporting lines to execute go-to-market strategy.
- ✓ Account coverage is optimized for high-potential markets and customers
- ✓ Sales resources are appropriately aligned to high-potential markets and customers

#### PROCESS & TECHNOLOGY ALIGNMENT

- ✓ Sales process is appropriate for and properly reflects our stated go-to-market strategy
- ✓ Sellers understand the sales process and execute it with discipline
- ✓ Sales tools truly enable sellers to advance the sale and they use them consistently
- ✓ Sales tools truly enable front-line managers to better manage their teams and their account portfolios



#### MANAGEMENT & COACHING ALIGNMENT

- ✓ Managers understand the sales organization's goals & objectives and can manage/coach to achieve these results
- ✓ Managers can develop capabilities of individual sellers
- ✓ Managers recognize and reward properly to keep sellers motivated and retain star performers

#### PEOPLE & ENABLEMENT ALIGNMENT

- ✓ Sales team understands go-to-market strategy and their specific responsibilities in executing it
- ✓ Sellers in different roles clearly understand how and when to collaborate to execute the sales process
- ✓ Sales metrics are appropriate for measuring seller progress toward goals
- ✓ Compensation structure incentivizes behavior that will achieve goals

# Sales Strategy Roadmap

This is the template you'll use to set, execute and manage your longer-term sales strategy. Keep in mind that successful business strategies are not static. Continually review your roadmap to determine whether your objectives need updating based on changes in the business.

<b>OBJECTIVE 1</b>	
<b>Description:</b>	
<b>Time Frame / Due Date:</b>	<b>Success Metrics:</b>
Strategy & Structure:	
Process & Technology:	
People & Enablement:	
Management & Coaching:	
<b>OBJECTIVE 2</b>	
<b>Description:</b>	
<b>Time Frame / Due Date:</b>	<b>Success Metrics:</b>
Strategy & Structure:	
Process & Technology:	
People & Enablement:	
Management & Coaching:	



## About The Brevet Group

The Brevet Group is a sales effectiveness and consulting firm that builds amazing sales teams. Our unique approach applies modern sales enablement practices to customized sales performance solutions.

We partner with clients who have the vision and guts to reimagine their approach to sales. We combine the discipline and insights of management consultants with the practicality of sales training to deliver impactful programs that move the needle quickly.

**Written by:**

Hope Eyre  
Principal Consultant  
The Brevet Group

