

# PIVOTAL PERFORMANCE SYSTEM



**GOAL: Work one-on-one with the sales leader(s) within an organization to help them implement the tools, skills, systems and processes required to make the sales team as effective as possible.**



## GOAL SETTING

Establish clear goals, set expectations and identify metrics to track progress on leadership and salespeople behaviors and activities, as well as results:

### LEADERS

- Sales Operating Systems
- Coaching skills
- Baseline metrics
- Delegation
- Time management
- Awareness
- Accountability
- Communication

### SALESPeOPLE

- Increased activities
- Increased opportunities
- Accountability
- Intentional plans
- Process adoption

### RESULTS

- Deals/revenue
- Visibility
- Accountability
- Confidence
- Clarity



## DATA GATHERING

Gain understanding of how the sales organization is operating today, what is working well and areas that have opportunity for improvement. This data is compiled through:

- Interviewing sales leader(s), executives/CEO, salespeople and sales support
- Reviewing all documents that can provide additional insight into the organization
- Identifying positive and negative consequence systems that drive behavior



## COACHING ACTION PLAN

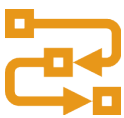
Based on the information gathered, the sales leader and Pivotal Advisors will meet with the CEO to align on the goals and areas to address. This will be captured in a Coaching Action Plan with a timeline which will be used to manage the engagement and track progress.



## PLAN EXECUTION: RECOMMENDED BI-WEEKLY SESSIONS

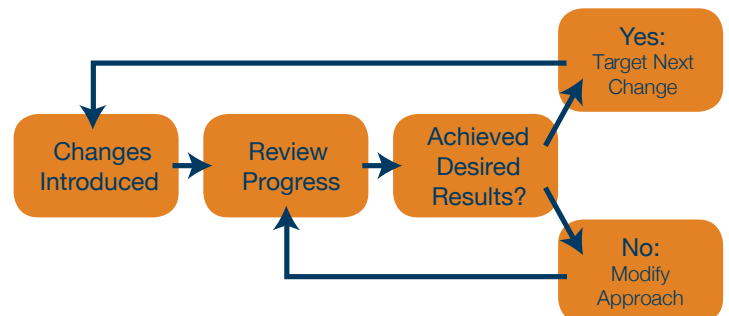
Pivotal Advisors helps sales leaders implement key changes into the organization to drive activity and results. This may include:

- Implementing a Sales Operating System
- Determining key metrics and setting expectations
- Implementing proactive sales plans
- Assessing sales team performance
- Developing coaching and feedback skills
- Implementing a Sales Process
- Creating more accountability



## PROCESS

Sales leaders work with Pivotal Advisors to consistently introduce the changes as outlined in the Coaching Action Plan and make adjustments as needed. Initially the sessions are more frequent to determine goals and understand the organization, then taper off as the sales leader establishes systems and processes and develops their own skills.



## DELIVERABLES INCLUDE:

- Input on Growth Strategy
- Implemented Sales Operating System
- Defined Sales Process
- Defined key metrics and scorecard
- Job Profiles and onboarding plans for new hires
- Compensation plan reviews
- Established pipeline and forecast
- Sales Training as needed



952.226.3381



www.PivotalAdvisors.com