

Sales Effectiveness Assessment Best Practices

This two-day course is to help you learn how to drive efficiency by using the correct tools and methodologies to assess your sales team and drive continued excellence.

Shanghai, China

21st & 22nd November 2011



Your International Facilitator:

Kiran Patel

Kiran Patel is a British living and working in China for the past 6 years. During that time he has accumulated a comprehensive range of experience in management, sales, negotiation, training and developing people from all backgrounds.

Originally posted to China in 2003 by his former employer Rolls Royce (Aviation), upon departure he eventually decided to set up base in China, and has over the past 4 years gained solid corporate training industry experience, working with reputable professional bodies, local SOEs, Fortune 500 companies, universities, business schools and numerous training partners. As GM of a business, he has acquired the necessary business skills to deliver a strong training program to his customers.

Kiran has an energetic style of delivery which participants will find both energizing and refreshing; and he places powerful emphasis on practical engagement.

Kiran has developed materials for MacMillan Publishers, Pearson, Cambridge ESOL, Open University and a range of edutainment products for Apple. This should give a strong indication as to the quality of the course that you will be purchasing.

In China, Kiran acts as a spokesperson for both Cambridge University ESOL and MacMillan Publishing House.

Some of his most notable cases are; Ogilvy & Mather, ACCA (Association of Certified Chartered Accountants), Deloitte, Hainan Airlines, and Agricultural Bank of China.

He has also trained staff from the following Fortune 500 companies; Caterpillar Inc, Continental Airlines, General Mills Inc, and Morgan Stanley.

From a personal standpoint, Kiran has a strong knowledge of the automotive industry and it a keen follower of motorsports.

Course Description:

■ Sales Effectiveness Assessment Best Practices

This two-day course will cover the necessary means and criteria for you to assess your sales team on. This will proceed forward from the initial stage of planning and goal setting through to performance analysis and staff development. The different facets of Customer Relationship Management (CRM) will also be introduced to participants to show them how to identify who their customers really are, analyze the key components of CRM, and understand how it integrates within an organization.

What the Seminar Will Help You Achieve:

- Ensure that sales targets are set appropriately
- Monitor the effectiveness of your sales team according to set targets
- Ensure that your customer's needs are reachable through utilizing the correct methodology
- Develop and implement a consistent approach throughout the sales team
- Select the most relevant tools to assess your sales team's strengths and weaknesses; and manage performance effectively
- Understand the need for continuous improvement and develop a suitable training mechanism to develop skills appropriately among the team
- Develop an understanding of the terms and benefits of CRM on a company's bottom line
- Identify how CRM creates value for organizations and customers.

Testimonials

"Our finance department received great benefit from the recent series of workshops that you delivered. We look forward to continuing our support long - term."-Denny Tang, CFO, Ogilvy & Mather Group, Greater China

"Thank you for your continued support of ACCA activities. Your trainings form an integral part of our Professional Development platform for ACCA members and students."-Maggie Li, ACCA Marketing Manager, Greater China

Pre-Course Questionnaire

In order to tailor this course precisely to your needs, the course leaders would value information on your knowledge, experience and requirements.

Day 1

0830 Registration and morning coffee

0900 Introduction

0915 Goal Setting and Sales Plans

Participants will use the SMART model to create positive, achievable sales strategic goals. Participants will learn how to articulate what their goals are; quantify the activity required and how they established them including the process to be followed to maximize their potential to achieve. They will then build a sales plan according to a given case study.

1040 Morning Refreshments

1055 Sales Forecasting and Analysis

Ensure that customer needs are achievable through putting Key Account Planning, Stakeholder Analysis, and/or Territory Management tools in place to assist reps.

1140 Ensuring Consistency in the Sales Process

Develop and monitor standardized procedures to ensure that the sales team operates at a consistent level in accordance with the company strategy.

1230 Lunch

1340 Choosing the right Assessment Tool

In this session, we will explore some of the key assessment tools available to benchmark the effectiveness of your sales team and use them.

1420 Delivering Appraisals

Sales roles are target orientated and the appraisal process can be a make or break step for sales team members. Here, we will develop the skills of giving constructive and motivational feedback to team members, ensuring that they remain focused on their targets. All team members require well delivered appraisals to get the best out of them, so this stage is critical.

1500 Afternoon Refreshments

1515 Channeling Information

Post sale, it is vital to ensure the key information permeates through the right channels.

1600 Training and Development of the Team

Identify strengths and weaknesses in your team and develop a suitable training program to ensure continuous improvement. This is something that should be implemented from the recruitment stage onwards. Relevant case studies will be used and the participants will act as consultants to a fictional company's sales team.

1700 Conclusion of Day 1 and Summary

About Kiran Patel

Courses Specialized In:

Sales, Negotiation, Communication, Leadership, Presentation Skills, Assertiveness, Coaching, Teambuilding, Influencing, Networking

Sector & Industry Experience:

Manufacturing, PR and Advertising, Telecom, Finance, Banking, Hospitality, Education

Some Major Clients:

ACCA, Deloitte, Ernst & Young, Ogilvy, Caterpillar Inc, Continental Airlines, General Mills Inc, HSBC, British Council

Course Format:

Through a combination of breakout sessions, group and individual work, interactive roundtable discussions and role-plays, and case studies. Delegates will understand the importance and practical application of sales effectiveness assessments.

Trainer will use practical examples and case studies to reinforce and expand the scope to cover applicable concepts for sales effectiveness assessments skills, and for a variety of different industries.

Day 2

0830 Registration and morning coffee

0900 Sales Methodology

Adopting a consultative sales methodology such as SPIN Selling, Miller Heiman, etc can be beneficial. This session will explore some of the key methodologies and how they can apply to your team.

0940 What CRM Is and Who It Serves

Next, participants will look at different types of CRM programs and the needs they can serve.

1015 Checklist for Success

This session will explore evaluation metrics and privacy issues.

1045 Morning Refreshments

1100 Requirement Driven Product Selection

During this session, participants will look at the Requirement Driven Product Selection process. This process requires defining the business need (or pain or problem, depending on the issue), deciding which functions are needed to meet the requirements, and then defining the products that support the selection.

1230 Lunch

1330 Strategies for Customer Retention

Next, participants will explore ways to retain customers through a large group discussion.

1415 Building the Future

During this session, participants will explore the four pillars of CRM and how they can use them to help others embrace the CRM plan.

1500 Afternoon Refreshments

Who should attend?

General Managers, Sales Directors, Sales managers and senior sales people who need to effectively manage sales departments and teams.

Account Managers and Salespeople with relevant sales experience.

1515 Homegrown vs. the Application Service Provider

Participants will look at the advantages and disadvantages of developing a program in-house versus using an Application Service Provider.

1600 The Development Team

This session will give participants the framework for building a stellar CRM team.

1640 Evaluating and Reviewing Your Program

To conclude the day, participants will look at some evaluation tools, including customer profiles and life cycles.

1700 Conclusion of Day 2 and Summary

At the end of the day, students will have an opportunity to ask questions and fill out an action plan.

About Martin Linking

Martin Linking Business Consulting plans to produce more than 80 trainings and conferences and works with senior executives from the majority of the world's top 1000 companies to improve their business strategy and match their learning and training needs in one year. And we continue to grow.

We also invite the leading business practitioners, industry decision makers and innovators to share insights, best business practice, and new technology at our forums. **We are dedicated to give attendees cutting edge information they can use immediately.** We constantly research and listen to all industry sectors to ensure that the business intelligence we provide is timely and cutting-edge.

In-House Training Solutions

If you have a number of delegates with similar training needs, then you may wish to consider having an In-House Training solution delivered locally on-site. Course can be tailored to specific requirements.

Please contact **Whitney Shen** on **+86 28 8532 7678** or email **whitney.shen@martinlinking.net** to discuss further possibilities.

销售效能评估最佳实践

这次为期两天的培训将帮助您学习如何使用正确的工具和方法评估您的销售团队来获得效率并驱动持续的卓越表现。

中国上海

2011年11月21-22日



您的国际培训师:

Kiran Patel

Kiran Patel 是一位在过去的 6 年里在中国工作的英国人。在这段时间里, 他积累了广泛的管理、销售、谈判和给各种背景的人培训和发展的经验。

在 2003 年, 他被前雇主劳斯莱斯 (航空) 派到中国, 在要离开时, 他最终决定在中国建立自己的事业, 在过去的四年多的时间里, 在与著名的专业机构、当地的国有企业、财富 500 强企业、大学、商业学校和众多的培训合作伙伴的合作中得到了坚实的企业培训的行业经验。作为一个公司的总经理, 他有足够的商业技能为客户提供好的培训项目。

Kiran 的风格非常有活力, 参会者将会得到激励和振作, 同时他非常强调实际的应用。

Kiran 为 MacMillan Publishers, Pearson, Cambridge ESOL, Open University 制作了很多出版物和教育材料以及为苹果公司制作了一些寓教于乐的产品。这点可以让您放心您将参加的课程的质量。

在中国, Kiran 是剑桥大学 ESOL 和 MacMillan Publishing House 的发言人。

他的一些突出的合作案例包括: Ogilvy & Mather, ACCA (Association of Certified Chartered Accountants), Deloitte, 海南航空公司和中国农业银行。

他还给以下的财富 500 强公司提供了培训: Caterpillar Inc, Continental Airlines, General Mills Inc, and Morgan Stanley。

从他个人的角度看, Kiran 具有很强的汽车工业知识, 还是赛车运动的爱好者。

课程描述:

■ 销售效能评估最佳实践

这次为期两天的培训将涵盖评估您的销售团队所必要的方法和标准。包括从初期阶段的计划和目标的设定到绩效分析和员工的发展。也将给参会者介绍客户关系管理 (CRM) 的不同方面来展示如何确定谁是真正顾客, 分析客户关系管理 (CRM) 的主要组成元素, 并了解如何将它整合到一个组织里。

这次培训将在以下方面给您帮助:

- 确保设置合适销售目标
- 根据设定的目标监控您的销售团队的有效性
- 确保通过利用正确的方法来保证客户的需求是可及的
- 在整个销售团队里发展并实行一致的方法
- 选择最相关工具来评估销售团队的优势和弱点; 并有效管理绩效
- 理解持续改进的必要性, 并建立一个合适的培训机制, 以在团队里适当地提高技能
- 在公司里发展对客户关系管理 (CRM) 术语和好处的普遍理解
- 认识客户关系管理 (CRM) 如何为公司和客户创造价值。

证言

“感谢您一直以来对 ACCA 活动的支持。您的培训为 ACCA 的会员和学员的职业发展平台组成了一个整体的部分。” - Maggie Li, ACCA Marketing Manager, Greater China

“我们的财务部门从您的最近的系列培训里大获受益。希望我们能够继续长远地支持您。” - Denny Tang, CFO, Ogilvy & Mather Group, Greater China

2011年11月21日 星期一

第一天

0830 签到和早茶

0900 培训介绍

0915 目标设定和销售计划

与会者将使用SMART模型创建正面的, 可实现的销售战略目标。

与会者将学习如何描述他们的目标, 以及如何量化所需的活动及如何建立应遵循的流程以最大限度地发挥他们的潜能。

然后, 他们将根据一个给定的案例研究制定一个销售计划。

1040 上午茶歇和人际交流

1055 销售预测与分析

确保客户的需求能够通过重要客户计划、利益相关者分析、和/或地域管理工具来协助销售人员得到满足。

1140 确保销售过程的一致性

开发和监测一套标准化程序, 以确保销售团队的运作与公司的策略保持相符。

1230 午餐及人际交流

1340 选择正确的评估工具

在这节课中, 我们将探讨一些用来衡量您的销售团队的效能的关键评估工具以及如何使用它们。

1420 提供评估

销售的角色是目标导向的, 评估的过程可能造成销售人员的离职。在这里, 我们将培养给项目组成员提出建设性的和激励性的反馈的技能, 确保他们仍然集中于他们的目标。团队的所有成员都需要良好交付的评估以发挥他们的最好水平, 所以这一阶段是至关重要的。

1500 午间休息及人际交流

1515 信息传递渠道

对于销售人员来说, 确保关键信息通过合适的渠道传递是至关重要的。

1600 培训和发展团队

识别您团队的优点和缺点, 并制定合适的培训计划以确保持续的改进。这应该从招聘阶段就开始实施。相关案例研究将被使用, 参与者将扮演一个虚构的公司销售团队的咨询顾问。

1700 第一天总结

关于 Kiran Patel

专长培训课程:

销售、谈判、交流、领导力、表达能力、自信、辅导、团队建设、影响力、人际网络建设

行业经验:

制造、公关广告、电信、金融、银行、商务接待、教育

部分主要客户:

ACCA、德勤、Ernst & Young、卡特彼勒、大陆航空公司、通用磨坊、汇丰银行、英国文化协会等

培训形式:

通过结合深入研讨, 团体和个人的协作, 互动圆桌讨论, 角色扮演和案例研究, 参会者将理解销售效能评估的重要性和实际应用技能。

培训师将使用的实际例子和个案研究以加强和扩大可实际应用的销售效能评估的概念并适合不同的行业。

2011年11月22日 星期二

第二天

0830 签到和早茶

0900 销售方法

采用咨询式的销售方法是比较有益的,如SPIN销售、Miller Heiman等方法。本节将分析的一些主要方法和如何把它们应用到您的团队里。

0940 CRM是什么及其服务对象

接下来参会者将考察不同类型的CRM项目和它们适用的范围。

1015 成功的清单

本节将分析评估指标和隐私问题。

1045 上午茶歇和人际交流

1100 需求驱动的产品选择

在本节参会者将着眼于需求驱动的产品选择过程。这个过程需要定义业务需求(或痛苦或问题,要视所涉有关问题而定),决定需要哪一个功能,然后定义支持该选择的产品。

1230 午餐及人际交流

1330 客户保留策略

接下来参会者将通过一次大的小组讨论探讨如何留住客户的方法。

1415 创造未来

在本节,与会者将探讨客户关系管理(CRM)的四个支柱与和如何使用它们来帮助别人支持客户关系管理(CRM)的计划。

1500 午间休息及人际交流

谁应参加?

总经理、销售总监、销售经理以及高级销售人员等需要有效地管理销售部门和团队的人士。

有相关销售经验的客户部经理和销售人员。

1515 内部开发 vs 应用服务提供商

与会者将看到内部开发一个项目与使用应用服务提供商的优缺点。

1600 开发团队

本节将给参会者提供一个建立一个优秀CRM团队的框架。

1640 评估和审查您的项目

在一天的最后,参会者将考察一些评价工具,包括客户档案和生命周期。

1700 第二天总结

在一天结束的时候,参会者将会有机会提问问题并填写一份行动计划。

关于马汀令可

马汀令可商务咨询计划每年组织超过80场的培训和会议,与全球1000强公司的高层经理一起提高他们的商务战略,满足他们的学习和培训需求。并且我们在不断成长。

我们邀请领先企业的管理者,决策者和创新者在我们的活动中分享他们的思想观念,最佳商业实践和新技术。**我们致力于为我们的客户提供即刻可用的前沿信息。**我们不断地研究和聆听所有行业的声音来保证我们提供的商业信息是及时和前沿的。

内训方案

如果贵公司有许多人有类似的培训需要,那么你不妨考虑内部培训的解决方案。培训将在贵公司现场举行。并且培训可以根据您具体的要求来进行。

请联系 **Whitney Shen** 来讨论合作的可能:

电话: **+86 28 8532 7678**

电邮: **whitney.shen@martinlinking.net**

Sales Effectiveness Assessments Best Practices

SH20111121-Sales Contract-Please Complete in Capital Letters and Black Ink

Sales Contract

Please complete this form immediately and fax back to

Whitney Shen

Fax No: +86 28 8532 6768

Fee Per Delegate

Two Day Training Fee US \$1295 per person

All the registered delegates are entitled for a set of documentation free of charge

DOCUMENTATION US \$300

If you are unable to attend the conference/training but wish to receive copies of the conference/training documentation, please complete the sales contract, tick this box and return the contract with payment details.

Full Payment is required within 5 working days

Name: _____

Position: _____

Email: _____

Name: _____

Position: _____

Email: _____

Name: _____

Position: _____

Email: _____

Organisation: _____

Address: _____

Town: _____ State: _____ Postcode: _____

Tel: _____ Fax: _____

Nature of Business: _____

Company Size: 1-99 100-249 250-499

500-999 1000+

Authorization

(Signatory must be authorized to sign on behalf of contracting organization.)

Name: _____

Position: _____

Signature: _____ Date: _____

This booking is invalid without a signature.



Register Now

Contact: Whitney Shen

Tel: +86 28 8532 7678

Fax: +86 28 8532 6768

Email: whitney.shen@martinlinking.net

Business Opportunities

An exhibition space is available at the conference. Sponsorship opportunities covering lunch, evening receptions and advertising in documentation packs are also available. Please contact Ms. Whitney Shen at +86 28 8532 7678.

Payment Method

Our payment terms are 5 working days on receipt of invoice and full payments can be made by bank transfer.

开户名: 成都马汀令可商务咨询有限公司

开户行: 中国工商银行成都市暑袜南街支行

账号: **4402928009022523952**

CONFIRMATION DETAILS: After receiving payment, a receipt will be issued. If you do not receive a letter outlining the conference details two weeks prior to the event, please contact the Conference Coordinator at Martin Linking.

Terms & Conditions:

1. Fees are inclusive of program materials and refreshments.
2. Payment Terms - Following completion and return of the registration form, full payment is required within five (5) working days upon the issuance of invoice. Payment must be received prior to the conference/training date. A receipt will be issued on payment. Due to limited conference/training seats, we advise early registration to avoid disappointment. We reserve the right to refuse admission if payment is not received on time.
3. Client's Cancellation/substitution - Provided the total fee has been paid, client's cancellation must be received in writing by MAIL or FAX four (4) weeks prior to the event in order to obtain an 85% credit to attend for any future **Martin Linking** Events. Under such circumstances, **Martin Linking** will retain the other 15% service fee to cover expenses for prior cost that has already been incurred upon the acceptance of registration. All bookings carry a 50% cancellation liability immediately after a signed sales contract has been received by **Martin Linking**.
4. If, for any unexpected circumstances or reasons that **Martin Linking** decides to postpone this event, the client hereby indemnifies and holds **Martin Linking** harmless from any cost incurred in by the client. The event fee will not be refunded, but can be credited to future **Martin Linking**' s events. **Martin Linking** reserves the right to change the content without notice.
5. Copyright etc. - All Intellectual Property rights in all materials produced or distributed BY **Martin Linking** in connection with this event is expressly reserved and any unauthorized duplication, publication or distribution is strictly prohibited.
6. Important note: In the event that **Martin Linking** permanently cancels the event for any reason whatsoever, (Including, but not limited to any force majeure occurrence) and provided that the event is not postponed to a later date nor is merged with another event, the client shall receive a refund for the amount that the Client has paid to such permanently cancelled event.