

## **Sales Staff Recruiting & Retention – The Power of Your People!**

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In this next series of articles, we will tackle the most crucial aspect of sales success: your people. A wise person once said that the decisions you make regarding who you surround yourself with have a greater impact on your success and quality of life than any other business decision you will make.

We will discuss the key steps of proper staffing strategies, such as defining position roles and responsibilities prior to sourcing, sourcing strategies and processes, tools, and the launch of your new employee.

### **Defining Your Position Roles & Responsibilities Prior to Sourcing**

I am amazed at how many organizations have staff roles and responsibilities that are undefined. How can you set expectations, measure results, and make decisions on staff without having first defined and documented these things?

I suggest you define and document roles and responsibilities prior to sourcing, interviewing, and hiring a salesperson. By following this process, you narrow your search criteria to only those candidates who have the talents to accomplish your sales objectives. Another benefit to following this process is that you will not hire based on “gut,” but rather on something more objective like data.

In one of my favorite books, *First, Break All the Rules*, Marcus Buckingham and Curt Coffman talk about why talent is more important than experience, brainpower, and willpower. They point out that “experience can teach valuable lessons; intelligence is a boon; and willpower – which great managers actually label a talent – is almost impossible to teach.” Further, they define talent as “recurring patterns of behavior that fit the role.”

So, you need to define the roles and responsibilities in order to identify the talents that are required to carry them out. **KNOW WHAT TALENTS YOU ARE LOOKING FOR!**

“Defining roles and responsibilities” can be interpreted many ways. I’ve seen it range from “sell \$1.2 million in new products,” to multi-page documents detailing every activity and process expectation to reach that \$1.2 million. The right answer lies somewhere between these two extremes. If not defined enough, you risk not hitting the expectations and not knowing why; if defined too much, you risk the person not using the document due to its complexity.

Let’s look at possible baseline data to include in your roles and responsibilities documentation.

A good tactic is to start with the general and move to the specific. Below is a brief example to help you with the main components of a baseline role and responsibility document. This sample template is for illustration purposes only. There are many tools out there for your use. Google “roles and responsibilities” and many options and links will be available to you.

## **Sales Representative Roles and Responsibilities**

### **Overview**

The Sales Representative will be responsible for establishing sales, customer service and support relationships with customers, prospects and those who may and/or will have influence over the decisions for...

### **Market**

The Sales Representative will have the responsibilities to manage all steps of the sales process with opportunities in the following industries:

- Educational Facilities...

### **Contact**

The Sales Representative will be responsible for establishing sales, customer service and support relationships with customers, prospects and those who will have influence over the decisions for ABC type products, within their given territory and within the identified markets. These relationships must be built and maintained within each of the below:

- School Boards and Owners...

### **Strategy**

The Sales Representative will maintain a sales strategy for all defined sales opportunities. Sales strategy consists of the following:

- Obtaining contact with all sales opportunities listed...
- Manage the sales process within the prospect's buying process with all those involved in the decision, with respect to ABC products and services, within all sales opportunities.
  - Proper preparation for all sales calls...

### **Sales Activity**

The Sales Representative will be responsible for maintaining an activity strategy within his/her account base. The minimum activity to be performed is as follows:

- 10 visits per month with...

### **Sales Results**

The Sales Representative will be responsible to bring in results that are at a minimum in line with ABC business plan goals. There are three types of results that are expected and they are:

- To accomplish first year sales of...

### **Etc...**

To summarize a few key points with regard to roles and responsibilities:

1. Who you decide to surround yourself with has a greater impact on your success and quality of life than any other business decision you will make.
2. Defining roles and responsibilities should occur **PRIOR** to sourcing your next new hire so that you are hiring based on the talents that are required to carry out the roles and responsibilities.
3. Roles and responsibilities should be documented and signed off on by all parties.
4. Define the roles and responsibilities enough to make them useful but not so much that they become an impediment to goal attainment.
5. Try to go from the general to the specific in the creation of your documented roles and responsibilities.
6. There are a myriad of tools and templates available for your use in the creation of your roles and responsibilities documentation.

Now that you have the roles and responsibilities documented for your next new hire, it is time to begin the search. In the next issue we will discuss sourcing strategies and sourcing processes.

Until then...

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