

Setting helpful
actions

a guide for sales managers

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Why should you care?

In a conversation with someone in your team, the thing that matters is what changes they make after they leave the call (or the room).

Because you wouldn't have had the conversation if they don't need to change anything, right?

That's why we often say,

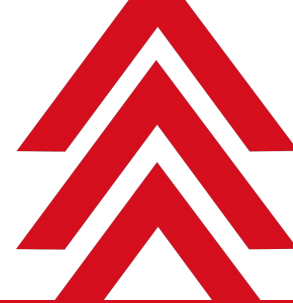
| A conversation without
| an action is *disposable*.

But figuring out what the rep should actually go and *do* to make a change can be tricky.

If you were looking for advice on how to achieve a 6 minute mile, someone telling you to "run faster" wouldn't actually help.

What's more helpful is something you can actively control, like "pace yourself at the start to save energy".

An example:



Alfred hasn't been creating new opportunities in his pipeline this quarter.

The cause?

After checking other details and asking some questions, you learn that he's been fixated on managing his existing opportunities.

What should change?

The behaviour you *want to see* is that Alfred balances his time better between prospecting and managing established deals.

Unhelpful action

Do more work on your pipeline creation

Helpful action

Do a minimum of 1 hour prospecting every day

To figure out what they need to change, first try to understand what they are currently doing to cause the issue.

In this example, you might look at their activities and see that they aren't actually doing enough prospecting.

When you talk to them about it, you learn that they are spending all their time on in-flight deals because they are focusing purely on this quarter's target and what's going to get them there.

The key to phrasing a helpful action is being able to paint a very clear picture of the thing you want them to do instead.

It shouldn't be: Just about the result (like creating new opportunities).

It should be: Within their control.
Clear to see if it was done or not.



An example:



Lots of deals in the pipeline being neglected

The cause?

Focusing on one or two big deals

What should change?

spend appropriate time working all in flight deals

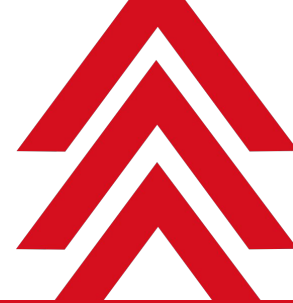
Unhelpful action

Balance time across across your whole pipeline

Helpful action

Do something on your smaller deals: either make a play, complete a task, or set up a (descriptive) next task if you can't do it yet

An example:



Pipeline isn't progressing - deals are stalling out

The cause?

No sense of urgency - being passive in managing their deal progression

What should change?

Understand what needs to happen to move each deal forward

Unhelpful action

Get control of your opportunities

Helpful action

Define a proactive task for each deal that will help you understand what's happening with the prospect and how you can progress it

An example:



Deals sitting in the wrong stages

The cause?

Reluctance to push a deal to a forecasted stage

What should change?

Confidence in progressing deals to forecasted stages as appropriate

Unhelpful action

Move your pipeline down funnel

Helpful action

Identify key items of information on potential forecastable deals and we'll review together to decide

An example:



Rushing to discount

The cause?

Thinking they could artificially accelerate a timeline

What should change?

On future deals, only using discount when it actually will impact the timeline

Unhelpful action

Only use the discount when it will impact the timeline

Helpful action

Review any other potential discount deals and confirm that an accelerated timeline is possible.



You don't need to use our software to apply this advice, but we'd love it if you did!

Ctrl.io is a data driven sales management tool.

Most software gives you metrics and dashboards, leaving you to use docs to manage the conversation manually.

But we bring the numbers into the conversation so you can create accountability and follow up - because that's what really drives performance.

Find out more at ctrl.io