

TRANSITIONING TO SALES MANAGEMENT: NEW RESPONSIBILITIES AND EXPECTATIONS

Congratulations! You have joined the ranks of sales management. This may even be your first experience as a manager. The good news is that you are not alone. Many resources like this book exist to learn from and help support your growth as a manager and a leader. You have climbed the sales ladder, have cultivated your skills, and are ready for a new challenge.

You can probably imagine that transitioning into management is very natural for some and more like charting unknown territory for others. You have a whole new set of responsibilities, and at the same time, the expectations others have of you have completely changed. In fact, these new demands come from both your sales team and your management team. This chapter will walk you through some of the core issues and hopefully provide you with some comfort knowing that (1) many have been here before, and (2) success is well within your reach.

GOING FROM "SELLING" TO "MANAGING"

While it is likely that you came from the world of selling, it is not a requirement. Sales managers typically choose management them-

selves, but other times senior management chooses them because they are seen as well respected by their peers and they possess many of the necessary traits of a good manager and leader. So while understanding the elements of selling are very important, what it takes to manage is a very different skills set. The following is a brief look at sales versus sales management and where they overlap.

First it is necessary to understand what the ideal salesperson should look like. He typically exhibits the following behaviors and traits:

Attentive	Courteous	Credible	Driven
Empathetic	Engaging	Enthusiastic	Passionate
Poised	Presentable	Results-Oriented	Smart
Good Listener	Knows the Products	Aggressive	Articulate

Furthermore, the truly well-rounded sales professional needs to possess four core areas of skills:

1. The communication and interpersonal skills necessary to carry out sales
2. A mastery of the sales process and how it relates to the business
3. Fundamental business competency
4. A solid understanding of the industry and marketplace

Figure 1-1 depicts these four categories.

On the other hand, the ideal sales manager has her own exemplary characteristics and traits, including the following:

Ambitious	Caring	Dedicated	Driven
Ethical	Moral	Passionate	Patient
Results-Oriented	Supportive	Smart	Understanding
Able to Help Motivate	Collaborative	Empathetic	Strategic

Of course, when you compare these to those of the salesperson, you will see many overlapping characteristics; yet look at them more closely, and you will clearly see areas of difference.

The four core areas of skills that truly well-rounded sales managers must possess are:

Figure 1-1. The sales skills model.



1. Critical management, communication, and team-building skills
2. The ability to lead into the future
3. An in-depth understanding of the business dynamics and competitive forces that impact the sales strategy
4. The core tools for building and managing accounts and channels of distribution

Figure 1-2 illustrates these four categories.

The interesting thing about sales managers is that they never fully remove themselves from the sale. “Selling” or “working” managers are good examples of this truism. For instance, in many companies, managers are expected to do just that—manage—while in other organizations managers are actually in charge of a certain number of accounts. They are expected to meet their “numbers” as well as ensure that their team does the same.

This scenario is common with many smaller sales organizations

Figure 1-2. The sales management model.



in which the limited budget and resources require a manager to cover a certain number of accounts. However, this is also the case with some of the largest corporations—the logic being that the sales manager built and forged many of the relationships as a salesperson, so why lose some of that momentum now? In a company with this philosophy, you would be very involved with customers during the entire sales process.

The tools and techniques in this book will improve you as both a manager and a salesperson. By covering some of the critical areas of selling, the book will help you develop your staff as a manager as well as fine-tune many of the skills you already possess as a salesperson. Remember, whether you are in an actual sales capacity or not, “selling is everything.”

UNDERSTANDING THE CURRENT SALES CULTURE

Before taking a look at some of the challenges you face as a new sales manager, it is important to take a deeper look into your corpo-

rate and departmental culture. The sales culture you are inheriting (good, bad, or indifferent) has its roots in the larger corporate environment.

Culture within an organization or even industry is an extremely broad topic. In this context it does not relate to a person’s country of origin. Rather, it relates to the overall feeling that one gets when working in a particular industry, company, and department.

Figure 1-3 shows three major culture sets—that of the industry as a whole, the company, and the sales department within that company. This cultural misalignment is often the reality. The ideal is depicted in Figure 1-4, where all three cultures meld together.

It is important to understand how much cultural overlap there is between your department and your company, and your company and the industry. Obviously, when there is more overlap, there is a greater chance of success.

Here are some questions you should ask in determining the business culture that surrounds you.

Figure 1-3. Cultural misalignment.

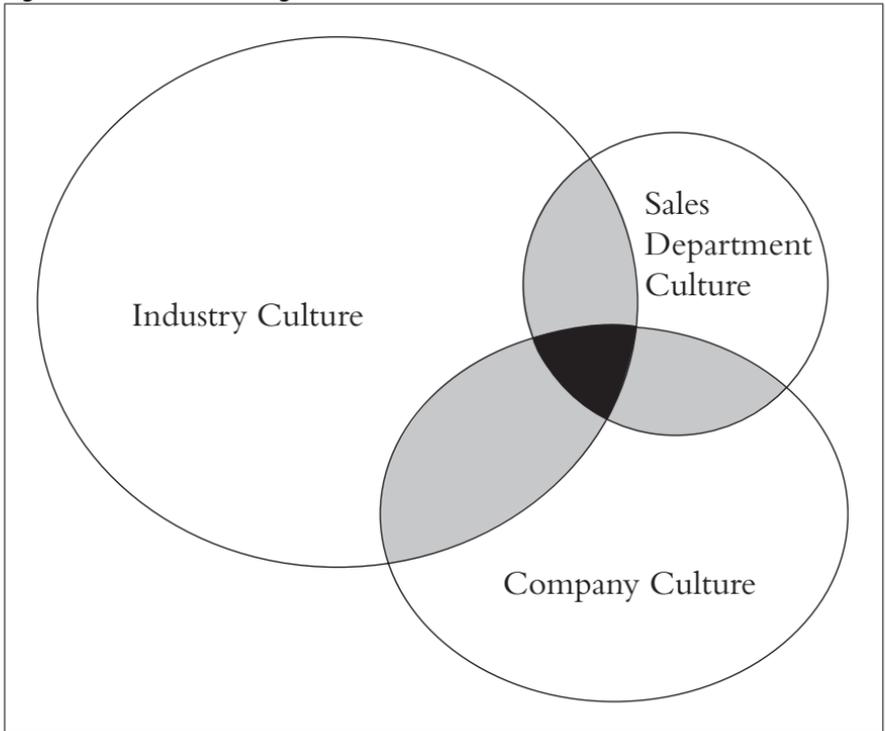
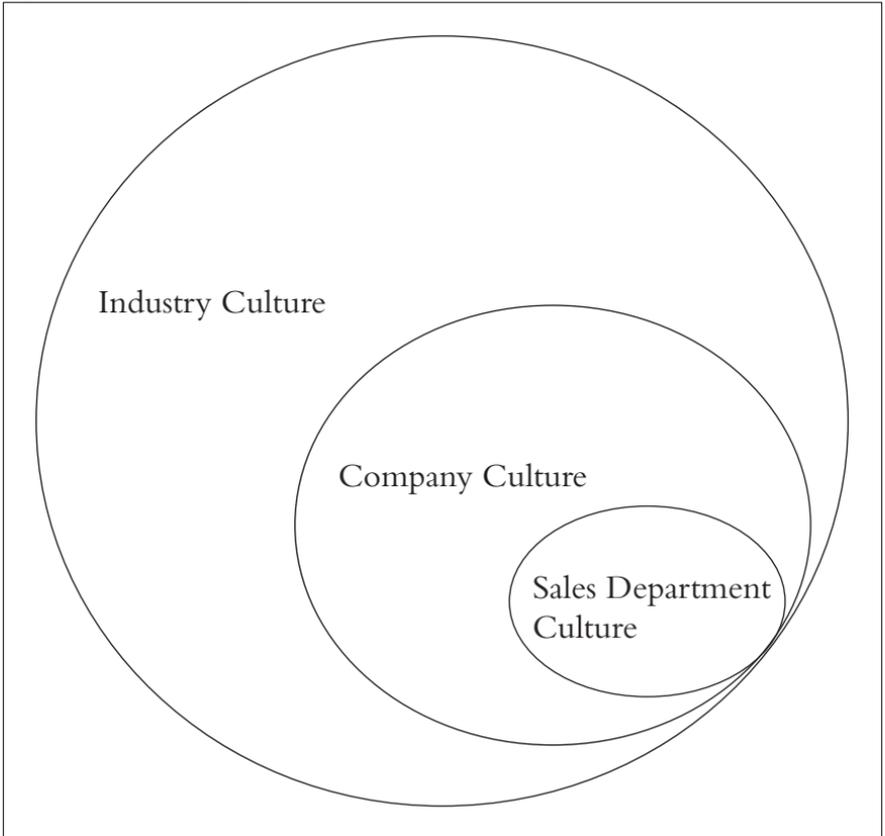


Figure 1-4. Cultural alignment.



About the Industry

- Is it a conservative environment? Is the dress code formal or casual?
- Is it a very analytical type of business? Typical industries include research, consulting, engineering, etc.
- Is it a creative environment? Typical industries include consumer products, advertising, etc.

About the Company

- What does senior management value?
- How does your company communicate to outside stakeholders, the media, etc. (public relations and corporate communications)?

- Is the corporate culture actually defined by your organization?
- How are performance management and reviews done at your company (hierarchical, 360, peer review, etc.)?

About the Department

- Is there a great deal of interaction among departments, or do individuals or separate groups work in silos?
- Is there an “us versus them” mentality? For instance, is there competition for budgets, resources, etc.?
- What are the differences or similarities among departments such as marketing, sales, finance, human resources, research and development, operations, etc.?

The problem of cultural misalignment is often exhibited in large corporations with numerous business units, where a distinct culture could exist in different parts of the company. Industries that would commonly fall into this category are media conglomerates, financial services, consumer products, and most multinational corporations. But ironically, many small companies have similar “culture clashes” to contend with. Of course, you are not likely to be in the position to affect major change across the organization, but you can play your part, and that’s something you should keep in mind.

Now that you have looked at the different levels (industry, corporate, departmental), it is important to relate your department to the overall company. For example:

- How is sales viewed by the company?
- Do resources (people, time, money) seem limited, or is there an abundance of resources available?
- To what level of detail do you have to prove your business case?
- Is yours and the rest of your department’s collaboration with others expected, and is it easy or difficult to achieve?
- Does the human resources department support your efforts with training, compensation planning, rewards programs, hiring, counseling, etc.?

While all of these areas will be explored in more depth, you should at least be making mental notes of some of these questions

and/or issues. Now that you are in the management ranks, you will have ways to effect change, be it subtle or major change initiatives. Some of these categories might be as small as facilitating more discussions with other departments like marketing and finance. But you may effect a large-scale initiative, like changing the performance management process to better achieve corporate objectives.

Now that you have the basics for understanding the culture and environment you operate in, it is necessary to focus on some specific challenges and opportunities that fall under your new management responsibilities.

UNDERSTANDING WHO IS ON THE CURRENT TEAM

Managing Former Peers

The first issue for many new managers is managing those who just days ago were at the same level as them. Several issues crop up when a person is promoted to manage people who were formerly peers. They commonly fall into the following three categories:

- Managing friends
- Managing nonallies
- Managing experienced salespeople

Before delving into the challenges, let's first take a look at some of the positives. The new sales manager already knows many of the sales representatives' strengths and weaknesses. This is a tremendous asset when it comes to delegation. This also gives the new manager early insights when preparing a plan for the training and development of team members.

In addition, the newly appointed sales manager already has a certain amount of rapport with the team. This allows for open discussions about issues. A good rapport also creates a supportive foundation for problem solving and achieving goals.

As a new manager, you already possess certain management and leadership characteristics and have the backing of the management team. This enhances your credibility with both management and your sales staff.

Furthermore, as a new manager, you have overnight gained "position power." Whether you now have a new corner office, or

you remain in the same compact space, the fact is that power has shifted.

At the same time, without having extensive management experience and practice under your belt, making the transition to management is a significant adjustment. Even areas that seemed very basic and straightforward before will require extra effort and attention. Here are some of the core categories that touch on this transition phase of your new job as a sales manager.

Managing Friends

Many management consultants and psychology of management pundits suggest that any friendship should be set aside after a hierarchical change. The logic is that it is difficult to discipline and affectively give direction if you are too close to your subordinate. Also, the inherent premise in friendship is that both people are more or less on par with one another. Now the simple act of changing your title can change perceptions and emotions. Friendships are complicated even before someone is promoted, so when business and money are involved, this can only further complicate any issues or tensions.

On the other hand, friendships won't necessarily complicate working relationships. If handled correctly, the closeness of the relationship could lead to more positive results for all parties involved.

One of the mistakes people make with friends is to confuse work and personal issues. This can sometimes lead to the manager giving advice to their friends on issues that are unrelated to the job, yet the line is still blurred. Giving advice because you care is part of being a friend. But a boss is in a position of power in the relationship. Giving advice to a friend (now a subordinate) may suddenly seem like you are judging him. Even when you are giving advice directly related to the job, it can be difficult to do so; if the feedback is negative, she may feel that your perception of her has changed negatively. If this starts to happen, it hurts the team, the friendship, and the company. This problem can be avoided by proper goal setting and relating feedback to the goal. If you set goals properly and both parties accept them, the manager won't appear to be judging the friend. The friend's achievement will be measured by whether or not she reaches the goal.

Another challenge early on in management is dealing with weak-

nesses of a friend and/or former peer. How does a sales manager approach this person to correct a problem without destroying the relationship? Here the manager must specifically define and isolate the negative behavior and focus on job and the performance requirements, not on the personality. For example, you might be tempted to say, “Sally, what’s with all the complaints you have with the finance department? I think you’re overreacting to the terms they are stipulating for new customers. It’s making us all look bad.” Instead, you could say: “Sally, why don’t we sit down together with Steve in the finance department and talk about their requirements? They probably have some policies they must abide by and that make sense. We can stress the importance of getting new customers on board with minimal delays and see about making some subtle changes that will help you to close new business. Does that sound okay?” Here you have avoided using subjective words like *overreacting*, which would likely cause Sally to become defensive instead of open to dialogue. If you make the discussion more objective and focus on any positives, Sally is likely to be more receptive to your feedback.

An additional challenge to working with friends is maintaining that relationship while not letting it interfere with the success of the team. You must establish and agree on a business relationship as well as a social one. In other words, the notion of setting up boundaries is as important in your business life as in your private life. Others must not feel alienated or as if they are at a disadvantage. You always need to consider your rapport with the others on the team. If your team does not believe everyone is going to be treated equally, the team is at risk of falling apart. While some level of jealousy is inevitable, if unresolved it can become pervasive and hurt the team, the company, and most importantly you and your career growth.

Managing Nonallies

As a sales manager you will likely have to face the challenge of managing unsupportive people. Many times members of your team may not have been allies to begin with, or perhaps they felt that they or someone else should have received the promotion ahead of you. In other words, they don’t feel you deserve the job. But remember, you were promoted with good reason, so don’t let people like this affect your mind-set. You were probably promoted because

of a combination of your past success and your propensity to be a leader. It's important not to forget this, though you also need to be careful not to take it for granted or suddenly put on airs.

The good news is that in most cases you can greatly reduce if not eliminate negative perceptions of you. This is not something that happens overnight, so it will require patience on your part as well.

Mastering the competencies outlined in this book will greatly enhance your ability to eliminate this potential threat. If you practice solid management fundamentals, nonallies can actually become great allies. You could be pleasantly surprised to find that some of your most difficult staff could turn into your most ardent supporters.

Managing Experienced Salespeople

Some experienced salespeople may be resistant to a new sales manager. At the same time, new sales managers may be fearful of managing that seasoned or star salesperson. New managers often question their own ability. However, the expectation is not that you came into this role with all the practice and skills necessary. Be realistic about your staff as well as yourself. It is not in your best interest to avoid, smother, or micromanage the veteran sales players.

Winning the confidence of an experienced salesperson is best done through goal setting, as discussed in detail in Chapter 7. You must eliminate personality issues as quickly as possible. Again, focus on the position and its expectations and outcomes.

As a sales manager, you will gain respect quickly by identifying and maximizing the talents of each individual team member, including those who believe they do not need any help. Just as you have room to grow, so do the top performers on your team. In fact, it is common for star performers to plateau rather than build on their successes, thus keeping a lot of business on the table that could be further exploited.

Experienced salespeople can also be a valuable resource. Their advice can eliminate a great deal of the trial and error and help you establish yourself quickly, particularly if they play corporate politics well and are thus able to shed a positive light on you.

It is one of the primary tasks of a sales manager to maximize each team member's talents regardless of his experience level. A key

role of a manager is to help his employees offset any weaknesses through the development of better habits. At this time you may wish to chart some areas of strengths and weaknesses of each of your team members. Later you can fine-tune this.

THE CHALLENGES OF BEING ON TWO TEAMS AT ONCE

One of the issues faced by a new sales manager is the fact that the manager is now a *team player* on the management team as well as the *team leader* of the sales team.

This dual capacity creates some distinct loyalty issues—especially in times of conflict—between the salespeople and others at the corporate office. But your new position has at least two pluses. The first is that you now have an opportunity to change some of the decisions that seemed inappropriate when you were in a sales position. Maybe there was a communication problem from corporate headquarters, or maybe there was a lack of coordination between departments. Whatever the issue, you now have an opportunity to address and find ways to alleviate at least some of your concerns.

The second advantage is that you now have access to information that was not available before. There is a saying about the tree of success: The higher up the tree you go, the farther you can see. When investigating a defined concern, information may become available that justifies the current system. What appeared to be broken may actually work with some adjustments or modifications. On the other hand, your new perspective may allow you to develop a plan that would convince upper management to make some changes that would fix a broken system that has been directly affecting your sales department.

It is critical for the new sales manager to set priorities when considering those issues that need to be improved and then, through a coordinated effort with both the sales team and the management team, work through the issues. Also, keep in mind that most problems cannot be resolved right away. In many instances careful planning and, again, patience are essential in order to generate solutions.

Another challenge of being on two teams is that of managing the flow of information. It is up to you as a manager to function as part of the management team and then communicate and coordinate at the sales level. How you interpret and disseminate informa-

tion from the management team is key to getting the respect and buy-in that will help produce the desired results out of your team. This also holds true for information flow from your team to senior management. Here you must be careful to filter but not stifle communication, as information should flow as much from top down as from bottom up.

The exciting part is that you are now in a better place to influence many decisions. When you were a sales representative, the job was very clear, at least to you. Tasks needed to be completed in a timely fashion. You were in control of the overall job, and this allowed you to complete your tasks successfully. In time, your knowledge of the job and your confidence level were likely high. Now someone else is doing the job you were doing. And that person is not doing it the same way you did. Remember that having carbon copies of yourself on the sales team is never a good idea, so unless there is a real performance issue, allow for some differences in the way your team members handle things, and be careful not to micro-manage. People come from diverse backgrounds, and each team member possesses a different skill set that she brings to the table. It is not the sales manager's job to clone himself, but to capitalize on all the existing team assets and build from there.

You are no longer primarily evaluated on the functional ability of account management, but rather on your ability to make sound decisions that maximize the effectiveness of the sales force. Therefore, while you may still have to maintain some direct account responsibilities, your overall role and relationships with customers will change as well. For example, one of the most common challenges for a new sales manager is to have the courage to let go. Often, a new manager will burn out because she wants to continue performing responsibilities tied to the old job and do the new job at the same time. Work hours expand, and both business and personal stresses come into play. Sales managers must use strong judgment skills to set priorities and then to live by them. If not, you as well as the team will inevitably suffer in the long run.

At this time, it is important to fully recognize that the term *micromanager* never has a positive connotation. Everyone is familiar with this term, and while intuitively we recognize that it is wrong to manage by breathing down our staff's neck, it is still all too common. In fact, studies have found that the number one reason that employees leave a company is because of a problematic relationship

with their direct supervisor. While a troubled relationship with your manager is not always due to micromanaging, it can only exacerbate an already fragile or strained one. Therefore, there is no reason to perpetuate or be a part of this statistic. And the best way to ensure that you don't end up becoming a micromanager is by following sound management principles and by continually striving to become a better manager.

If you are working for a micromanager now—someone who is unreasonable with their requests, tries to control all of the details of your work, stifles your creativity, hinders your opportunities for career advancement, and just plain makes your job not enjoyable—don't overreact and let it get the best of you. Try and remember that micromanagers have their own personalities and are likely acting on deep-seated problems that have nothing to do with you. Their style is more likely related to their personal life than their business life.

Following are some other things to consider:

- By keeping a micromanager in the loop on certain core aspects of your job, especially any looming issues, you are heading off major confrontations.
- Pick your battles, because not everything is worth going toe-to-toe on. Realize that while an expectation might seem unreasonable, it could have an impact on your boss's job, and she might just be looking out for herself.
- When in doubt, take some time and regroup. When you put it in perspective, very little is worth getting yourself worked up over—before, during, or after the fact.

Of course, much of the advice above pertains to how you should work with any manager, good or bad. Yet it is usually the poor ones that make it more necessary to work on your coping skills.

By improving your relationship with your managers, you are able to have a clearer head and perform at a high level, so that you and your staff can benefit. Your sales team will increase performance, customers will receive the attention they deserve and expect from both the salesperson and you as a supportive manager, and your career will further advance.

All this amounts to the fact that your business world will be

changing. You have a whole new set of challenges and opportunities ahead of you.

EMBRACING CHANGE

Another critical aspect to become more comfortable with in order to succeed as a manager—and in all areas of your life—is change.

Much has been written about dealing with change and ways to embrace it so that it boosts you rather than bringing you down. The main thing to remember is that change is inevitable. Whether it is in your personal life or your career, nothing will remain stagnant, and, if something did, it would likely become boring or monotonous.

Unfortunately, change often has a negative connotation. However, not all change is bad, and in fact what often seems like a difficult transition can often be not only managed, but turned into a positive. Those who excel in their careers are able to work best in a changing environment, rather than fearing it. Everyone handles change differently, and most struggle with it (or at least are cautious or hesitant around it). You have the ability to do just the opposite.

The two main areas to think about when change occurs are:

- How might it affect you?
- How might it affect your team?

After that, it's critical to break down the pieces of the change one by one. Since change can range from a major corporate downsizing to adjusting the way your team turns in reports, you need to recognize what the change is all about and what repercussions it can have.

Some questions to ask are as follows:

How dramatic might this change be (layoffs or procedural change)?

How closely does it impact you and your team (directly related or just a marginal change)?

How likely will this change occur (definite or just a remote possibility)?

When is that change likely to occur (at once or in the medium or long run)?

Is the decision being made out of your hands, or is it something that you can have a say in?

Who is the change agent (you, someone else, a group of others)?

By looking at change in all of its parts, you can more easily begin to embrace it. While change can initially seem like it is either positive or negative, having no middle ground, it can be avoided (usually not the recommended approach), skewed in your favor, or at least mitigated so that the effects are not so drastic. Furthermore, while on the surface certain change seems entirely out of your hands, the way you react to it is entirely in your grasp. Once you understand what the change is all about, try these simple tips to help you cope with it.

- Limit your stress about the change, especially before anything has actually happened. It only exacerbates a problem and clouds your thinking or judgment.
- Once you know where the change is coming from, work with it, not against it.
- Have confidence in yourself. You have earned this position. You have also effectively handled change many times before.
- Be a creative thinker. Don't get caught up in overanalyzing the situation.
- Ask questions. That's really the only way to get to the answers and to be able to see where you fit into the equation.
- As best you can, map out your own plan to deal with the change as well as a backup plan should it not occur.

In short, since you already know that change is inevitable, work in coordination with it, rather than resisting it. This conscious level of thought about change and ways to handle it is what will set you apart from others.

THE BIG PICTURE—SHORT- AND LONG-TERM

As a new manager you are faced with much of the above, and more! You probably felt overwhelmed before you had staff to manage, and now you have a whole new set of challenges. Again, it is important to take a deep breath and realize that you do not have to tackle

every issue at once. For the moment, stay focused on the big picture, especially where you are today and where you want to be in the future.

The following are some categories to consider as it relates to your new job today and tomorrow:

Short Term

In the short term (i.e., over the next three months), you should be getting to know your staff, managers, customers, and the major components and requirements of your new role.

Know Your Staff

- Learn what they like most and least about the job.
- Begin to identify areas where they excel and where they need the most assistance and support.
- Get a feel for their workload (sales in progress, pipeline, follow-ups, proposals in progress, etc.).
- Identify any major customer opportunities or problems that need immediate attention.
- Identify any larger staff problems (counseling, probation, etc.) that are pressing and require either your and/or the involvement of others.

Your Managers' Expectations

- Find out what their daily, weekly, and monthly demands are.
- Determine if they are more hands-on- or hands-off-style managers.
- See what initial reports, analyses, and/or assessments they expect from you.

Meet Others in the Organization

- Begin to network with others in the organization.
- Meet people of various levels and in various departments.
- Get a feel for how they tie in to what you do and how you can benefit one another.

Meet Customers

- Determine which customers are of strategic priority.
- When appropriate, make an introduction (by phone or in person) along with the corresponding salesperson.

Long Term

As you look toward the future, you will need to consider where you want both you and your team to be.

Your Team

- What shape would you like your team to take in the next six months, year, etc.?
- Identify any major gaps in resources that you would likely need to fill.
- What are your manager's expectations of you and your team in the long term?

Your Career

- What are your career aspirations?
- Do you wish to move up in the ranks of sales management?
- Do you wish to eventually move into another area such as marketing or operations?
- Do you wish to eventually become a C-level officer (CEO, COO, CMO, CIO, etc.)?
- What about switching industries down the road?
- Are you in a very technical profession? How transferable are your skills?

Whatever your interest and long-term aspirations, you are probably a committed person who, for a combination of financial and/or nonfinancial reasons, is motivated to succeed as a sales manager. So sit back for a moment and take a look at the big picture before you get caught up in the minor details. It's always a good idea to start.

Also, rest assured that while some solutions are more difficult to find than others, there is almost always an answer. The time it takes to get there may vary. Many times you alone will not be capable of remedying a problem. You will have assistance along the way. This may include having to turn over the problem to another key stakeholder. However, you will need to become adept at recognizing the different scenarios so that you can react appropriately. This book is meant to do just that.

WHAT'S NEXT?

Now that you have a clearer understanding of the sales culture you are a part of, the major transitional challenges, and the short- and

long-term questions you should begin to look at, you will now explore the world of communications, because without the ability to communicate effectively, no amount of drive or passion will get you to where you want to be.

Then you will look at the planning process, as it relates both to the company and your team directly. After that, you will move on to the interviewing and hiring process, a complex area that will be simplified into some core, understandable steps. From there the topic of productivity will be explored, and the role of motivation and compensation. Then you will look at the key techniques for training, coaching, and counseling. Finally, you will explore what it takes to truly inspire your team and become a leader.