



A Leader's Guide to Promoting Salespeople

Avoid mistakes when promoting sellers to managers

You've made the decision to promote an inside sales person to a full cycle sales role, hopefully because they have been successful in their current role and have the necessary competencies to succeed in their new role. Or maybe you have decided to promote one of your sellers to a manager role.



Consider the lists below and determine which competencies, attitudes, and beliefs they already possess to be successful in their new role. If they are missing any of the items below, be

SELLER COMPETENCIES
Strong Desire for Sales Success
Strong Commitment to Sales Success
Outlook
Responsibility
Motivation
Doesn't Need Approval
Stays in the Moment
Supportive Beliefs about Sales
Supportive Buy Cycle
Comfortable Discussing Money
Rejection Proof
Gains Trust
Follows a Milestone-Centric Sales Process
Exhibits Sales Posturing
Consultative Selling
Selling Value
Qualifying
Figure-It-Out Factor
Closing
Negotiating
Embracing Sales Technology

MANAGER COMPETENCIES
Strong Desire for Sales Management Success
Commitment to Sales Management Success
Outlook
Responsibility
Motivation
Doesn't Need Approval
Stays in the Moment
Supportive Beliefs about Sales Management
Supportive Buy Cycle
Comfortable Discussing Money
Coaching
Motivating
Accountability
Recruiting
Pipeline Management
Relationship Building
Closing
Milestone-Centric Sales Process
Embracing Sales Technology
Team-Focused

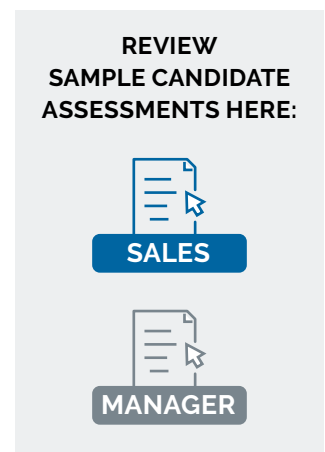
DECIDING TO PROMOTE

If you are promoting to full cycle sales or promoting to Manager, there are steps you must take that apply to both situations. The individual must be succeeding in their current role. Do not promote if they are not. It sets them up for failure and potentially lays the groundwork for animosity from their co-workers. It erodes any accountability framework that you may have established. It also plays games with their mindset. They may lack confidence moving into their new role if they haven't established themselves previously. There are two specific rules to follow when considering a promotion.

- 1 Interview them for the position like you would any outside candidate.
- 2 Onboard them similarly to how you would with an outside candidate, the introduction to your company, HR, policies, etc.

STEP 1: THE INTERVIEW

1. How well does his/her background predict success in this position? Include their level of success in their current role, but also learn if they have other relevant experience outside your company that may help them succeed in this new role. And remember, don't pretend that being an inside seller is similar enough to a full-cycle salesperson to predict success.
2. How will his/her weaknesses impact his/her likeliness of success? Use the lists above as a checklist for each role. Based on your knowledge of the individual, be as objective as possible regarding their proficiency in these different areas. Create interview questions around them. Or better yet, use the most accurate and predictive sales-specific assessment tools on the market created by Objective Management Group as part of the process in determining their strengths, skills and gaps which will help you identify areas that may cause problems and will provide you questions to use in the interview.
3. Sales or Coaching Simulation. If promoting to a quota carrying sales role, then ask them to role play a discovery call with you operating as the lead. They won't be perfect, but you can get a sense of how they might operate. Too much talking? Or are they good at drawing the prospect (you) out to discuss your needs?



If promoting to a Manager role, set up a coaching situation where you are the salesperson that has not met their sales quota over the last month or quarter (depending on your situation). What you are listening for is if they are focused on coaching and accountability. Are they asking questions and listening as the salesperson (you) explains why you are not producing results? Do they offer to take the blame if you aren't doing what you must? Do they coach or do they tell too much?

4. **Observations.** If you conduct repeatable objective interviews with individuals being considered for promotion similarly to outside candidates you will have far more success. And you should incorporate your subjective observations into consideration as long as you are being as objective about the rest of the interview as possible. If promoting to an outside or a field sales role, if they are going to have to meet face-to-face, where they were only on the phone or Zoom previously, are they presentable? Do they have a sweaty handshake? Are they not comfortable in person vs being virtual? Do they dress appropriately? Do they have the appropriate level of magnetism to gain respect and trust of the other party. It is far different asking prospects to spend money with you than it is to schedule an appointment or fielding prospects or customers that call in.

And if you are considering them for a manager role, do they have the gravitas to command the respect from their former peers? Will they be willing to give honest feedback? How will they be able to break out of being “one-of-the-gang” and elevate to a leadership role? It isn't always that easy, but do not ignore the little yellow flags that set off alarm signals in your head.

5. **Conclude with a Project Assignment.** Finally, just like when interviewing any other candidate, ask your internal candidates to complete a project of how they will hit the



If you would like to take the OMG Sales Candidate Assessment for a test drive feel free to access a [FREE use here](#).

STEP 2: ONBOARDING

Treat your promoted employees just like you would new hires. If you want them to have success in their new role, set expectations, help them understand the nuances of their new role and coach them. There is no replacement for spending time with them. If they are moving from inside to outside sales, be certain to have their manager (if it isn't you) establish a coaching cadence, and expectations for behaviors, activities and outcomes.

When Onboarding a Newly Promoted Manager

And if they are moving into a management role and will report to you or someone on your leadership team, be certain to also set clear expectations around their activities and behaviors. There should be KPIs set not just around what their team will need to produce in sales, but also with regard to how they will spend their time. Specifically set expectations around these focus areas:



Coaching Time - how often and how much time spent - to produce the best results ideal time is 50% of their time



Coaching Focus - which includes areas that they will focus on with their team members (there should be expectations around them helping their team members improve their effectiveness, not just telling them what to do, or closing the sale for them)



Accountability - meaning what they are holding their team members accountable to from a behavior and activity standpoint (inspect what you expect)



Motivation - including understanding that motivating IS actually part of their job, rather than believing that all salespeople should be adequately motivated themselves. They also need to understand not just how motivated an

Be sure to set expectations with regard to the KPIs that you will be measuring and what their role is in that. Don't forget that you will need to be coaching them, holding them accountable to the behaviors you value, and understanding how they are motivated as well.

When Onboarding a New Quote Carrying Salesperson

The manager or leader has obligations when it comes to onboarding a new or newly promotes salesperson and it is no different whether they are new to the company or promoted to

Leadership's Obligations to the New Salesperson

1. A large list of the best, most thought-provoking questions that will help them uncover the true needs or problems of the prospect as they conduct deeper conversations than they did as an inside salesperson.
2. Stories of solutions you have provided for clients that they can use when describing more about how your company has helped other similar clients.
3. The advantages of using your services compared to other options the prospects have.
4. An understanding of how to calculate the ROI of your products or services from the clients' perspective.
5. The math of success necessary for this position, meaning how many first appointments are necessary each week to generate enough opportunities based on typical closing ratios, and the likely level and type of activity that will be necessary by the salesperson to generate those appointments.
6. Clear, understandable expectations along the way for the first day, the first week, the first month and the next two months or longer depending on the complexity of

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We created the checklist on the following page to help with prioritizing the most important elements when onboarding a seller. Utilize others in the organization to help with the various aspects.



If you would like more detailed information about hiring and onboarding for sales, please review our eBook titled *Hiring: Build a Profit-Producing Engine*.

And if you want more assistance with any of your sales questions or needs please reach out to us at info@braveheartsales.com and check out our website at www.braveheartsales.com where you can find additional tools and resources.

THE SELLER ONBOARDING CHECKLIST

WHAT	WHO
<p>Review Product and Service Training</p> <ul style="list-style-type: none"> • Typical Applications • Typical Customers • Typical Markets • Problems solved by the product • Comparison to the competition 	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<p>Review Company Ideology and Philosophy</p>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<p>Their Role and any potential growth opportunity</p>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<p>Target Prospect for them (where they will focus)</p>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<p>What does the discovery call sound like?</p>	
<ul style="list-style-type: none"> • Questions to highlight your value 	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<ul style="list-style-type: none"> • Questions to ask <ul style="list-style-type: none"> – <i>To understand their compelling reason</i> – <i>To determine required ROI</i> – <i>To understand their decision process</i> 	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<ul style="list-style-type: none"> • How to disqualify a client 	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<ul style="list-style-type: none"> • The typical sales call <ul style="list-style-type: none"> – <i>Flow</i> – <i>Steps</i> – <i>Milestones that move an opportunity along</i> – <i>Competition</i> – <i>Possible Objections</i> 	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>