

What roles are you asking your Sales Managers to fulfil?

Sales Management Development

The vast majority of Sales Managers have a good track record in intermediary sales; they are sales people at heart. In a targeted environment this can create pressures between the short term:

- Achieving target
- Position in league tables
- Maximising earnings

and the longer term:

- Development of the team
- Development of potential IFAs
- Development of relationships with internal customers/stakeholders

Sales Managers need to have clarity about the key elements of their role and the required standards.

| Typical Issues | Momentab2b Solution |
|---|---|
| Inconsistent assessment of Account Manager in the role | Performance measured against defined standards and behaviours |
| Remote working Account Managers feel isolated and demotivated | Motivated Account Managers working to consistent and clear standards |
| Sales Manager acts as 'super' Account Manager when in front of IFA | Account Manager and Sales Manager with defined roles in IFA meetings with Sales Manager reviewing the Account Manager's performance |
| Sales Manager provides subjective and inconsistent feedback | Account Manager receives evidenced and objective feedback in an appropriate and timely manner |
| Management of activity and business levels as focus | Sales Management that has coaching at its heart |
| Management of high performers can involve letting them "get on with it" | Management of high performers ensures consistency and releases further potential |
| Disconnected thinking between different sales functions | Sales Manager actively works with other sales functions to build an aligned strategy for dealing with accounts |

Not only does a successful Sales Manager need to have been, and still be, a successful salesperson, they also need to be proficient in the following skills:

- Observation & feedback
- Coaching
- Running sales meetings
- Conducting 1:1s
- Performance management
- Leadership
- Business planning

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Sales Managers are vital to embedding centrally driven training programmes (and other corporate initiatives) and fundamental to the development of their Account Managers. The Sales Manager is key to obtaining a return on any investment made in Account Managers.

Momentab2b offer a broad range of Management Development support and training which covers the Knowledge, Skills, Attitude and Processes required in the role. This includes:

- Challenging current practice and focussing on the key elements of the role
- Coaching including:
 - Coaching models
 - Observation and feedback skills
 - Guidelines on conducting 1:1s
 - Planning for joint calls
 - Building personal development plans
- Business planning
- Team Dynamics
- Developing high performing individuals and teams
 - Understanding team dynamics
 - Understanding personal style and behaviours
 - Identifying individuals' styles
- Internal communications
 - Developing communication strategies
 - Sales meetings
 - Internal stakeholder management

Management Development RealPlay

We also offer a management development capability called **RealPlay** that allows managers to observe role plays between an Account Manager and **real IFA**, and then conduct feedback and coaching.

Whilst they are conducting the coaching session they are being observed and videoed so that they can then obtain feedback and coaching from a **Momentab2b** coach.

This process allows managers to receive real feedback on their observation, feedback and coaching skills – something they rarely obtain.

What some of our clients say about us:

"Momentab2b have worked successfully on coaching and feedback with our sales managers enabling them to embed and enhance the skills training delivered."

"Momentab2b's coaching on where we spend our time has been invaluable"

Read more about what our clients think at; www.m-hl.com/b2b

About Momentab2b

Momentab2b is a subsidiary of Momenta Holdings, an established Advice, Training and Business Review consultancy dedicated to the financial services industry.

Since 2002 we have been providing bespoke business consultancy and training solutions for financial services companies transacting business through intermediaries.

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