

# CHANGE MANAGEMENT PROCESS FOR SALES FORCE TRANSFORMATION

## 1. ESTABLISH THE NEED FOR CHANGE

Run a series of downbeat meetings highlighting recent successes of your competitors against your sales team. Show data if available confirming the rise of your competition and their overall successes. Identify industry trends and industry thought leaders that validate the need for change. Use customer complaints and poor customer satisfaction survey results to communicate end user dissatisfaction. Where possible, share data that shows any losses to confirm the need for change. Share any relevant and recent negative press clippings. Eliminate complacency and indifference. Use forecasting tools to reinforce the size and scope of the problem. Identify any obstacles, such as people and technology to the change. Create a sense of urgency towards the idea of change.

## 2. CREATE A DRIVING FORCE – THE CHANGE TEAM

The more people driving change increases the chances of change actually taking place. A winning Change team will have authority to overrule any people obstacles. Expertise in the relevant areas. Credibility within the organization so people listen when the team speaks and Leadership skills to drive the process forward. Lastly the team must have a data analyst who is responsible for capturing and disseminating supporting data. Drive responsibility for the change downward and wherever possible use scorecards for measurement that tie in to personal reviews. Where possible incentivise the Change team to reward success. The Change team must understand they are responsible for the success of the project. The Leadership of the organisation is responsible for Vision & Strategy, Management is responsible for planning and execution.

## 3. DEVELOP A VISION, GOALS & STRATEGY

Like every successful journey we need to define the destination or vision before we start. The Vision must engage everyone involved, not simply the company leadership and must get people on board and get them engaged. Set change goals which are both realistic and achievable. Define the strategy for achieving the goals.

## 4. PLANNING

In order to ensure the Change team are engaged use them to create the project plan and the budgets. Use external facilitators to “guide” the change team when planning as they have typically never been involved in a similar process. There may well be push back from the Change Team in terms of what they envisage the solution to be. The Change Team must be prepared to accept external guidance in terms of the solution from experts. Effective planning would include bi-weekly meetings and contingency plans if the journey becomes difficult. Planning would also include any required changes with technology and people which could block the change process. Plan “Ride Alongs” where Managers accompany sales people on their calls to help mentor them and ensure compliance with the new process. Create examples of best practice and share amongst sales people.

## 5. COMMUNICATING THE CHANGE VISION

Develop a communications plan in order that the Vision is communicated daily in as many different ways as possible. Emails, Newsletters, Presentations, Meetings, Offsites, Video Conferencing, Intranet, Workshops etc. Create a Buzz within the organisation to ensure the Vision is front of mind for everyone, every day. Develop tag lines, competitions and rewards. Every employee must understand what is in it for them, security, financial, promotion etc. The Vision needs to spread like a virus through the company and stick. Sales people need confirmation of their new roles and responsibilities and most importantly of all sales people need to confirmation of any attitudes and behaviours. Use scorecards to measure performance and ensure sales people know this is linked to their annual reviews.

## 6. EMPOWERING THE SALES FLOOR

Remove or realign any and all obstacles of Change such as technology and people. Provide training and then on going coaching to support sales people. Have as many short stand-up meetings as time permits to keep people focussed.

## 7. GENERATE SHORT TERM WINS

Success breeds success so by generating short term wins that we can relay to the sales floor is essential to maintaining momentum. Furthermore this helps undermine any people blocking the change, keeps people on board and provides hard data to validate the strategy. Develop mini case studies to share on the sales floor and use forecasting tools to demonstrate the long term effect of the change.

## 8. CONSOLIDATE & GROW MORE

At this point the danger is the sales people ease up as they feel a sense of accomplishment. Sales people will claim they get it and are doing it, but in reality they have only part changed. This is the make or break point, as sales people will only have adopted some of the change – the bits they are comfortable with. Easing up now will only see the change start to regress and before long the organisation will be back where it started. Managers now more than ever need to hold the sales people accountable to the new behaviours.

Please note our expertise and experience in driving change within sales teams allows us to provide a unique and objective service, where we can facilitate the initial meetings that provide the foundation for change. This ensures the above process is refined and bespoke to your organisation for maximum impact.

Please also read our document [Why Sales Training Fails](#).