e^{2}m Effective Evaluation and Measurement

Using e^{2}m

Using e^{2}m is easy – these pages show you how

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Overview

Using the e^{2}m service

Once registered, it is easy to set up your team Dashboard. This is a simple process of adding the details of your sales team members and then the types of meetings that will be the most appropriate 'model' for them. Don't worry about this too much at the beginning. You can add (or remove) people and meeting types whenever you wish. You can start with just one person and the first type of meeting.

Choosing meeting types for your dashboard

Different types of meeting have different objectives. Each has its own approach depending on whether it's on the phone or face to face and where the customer or prospect is in the sales cycle. Full details of the different call types are on the Add/remove meeting type page. Read through these carefully to make sure you choose the most relevant type.

What do I have to do before observing a call?

Discuss the process with your team (why you are doing this, benefits to them, what will happen afterwards). Choose the meeting type and download the appropriate scoring sheet and make sure you are familiar with what you are looking for.

At the meeting

You need not take part in the client meeting; you are there to observe your team member's performance. You will explain to the client at the beginning that you are simply there to observe. You should resist the urge to 'help' the salesperson during the meeting. Firstly because it will undermine their authority and secondly because it would make the observation invalid. Try to be as unobtrusive as possible, making notes, scoring as you go along if you wish. Note some good points as well as areas for development.

After the meeting

It is a good idea to have a detailed discussion about the way the meeting went immediately after the call - immediate feedback is always the best. Then you can schedule some time with the salesperson to review your report and agree actions when you are back in the office. As soon as you can, enter the results of the observation into the e^{2}m system, look at the results and decide how you can coach the individual at your next one-to-one.

Developing the salesperson

1. Look through our Sales Manager as a Coach resource. This is a great set of tools and techniques to help you to improve the quality of your coaching.
2. Review areas for development and decide on which area you are going to focus. Focus on one area at a time. Look at our other coaching resources for relevant material.
3. Review objectives set at previous meetings to ensure progress.
4. Discuss development action and agree at least one objective and enter the details of that objective onto the system.
5. Fix a date in your diaries for the next assessment and/or 1:1 to review progress. We recommend that you observe at least one call a month with each of your team.
6. Ensure you reward progress with positive feedback to the individual and share best practice amongst the team.

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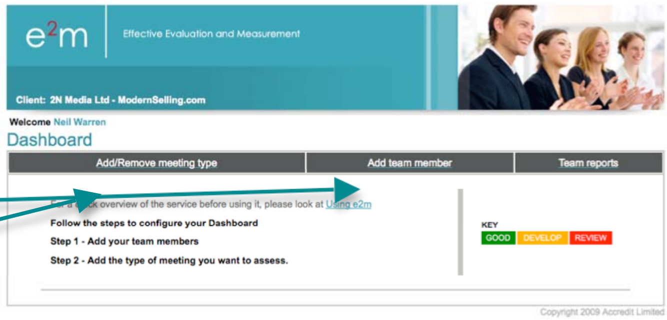
Setting up the Dashboard

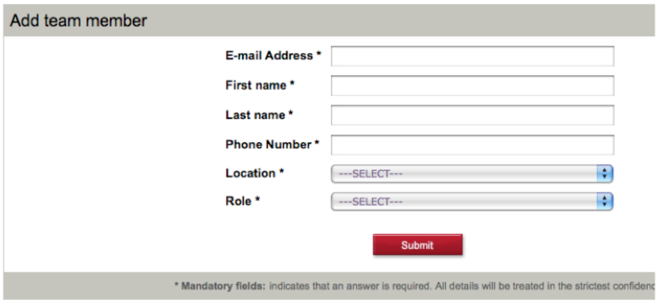
Once registered, enter details of your salespeople by clicking on the Add Team Member button

Then add at least one 'meeting type' that best reflects the sort of meetings that your salesperson has.



Add team member

Enter all details – these can be changed at any time.



About meeting types

Customer meetings often have differing objectives and therefore require their own approach. Face to face and phone meeting templates are available on e²m for each of the three meeting types offered. Add or remove relevant meeting types from your dashboard at any time.

The Uncovering Need meeting	Getting a better understanding of the customer's needs. This template is to be used for evaluating a meeting where the objective is to gain a better understanding of the customer's business needs at an early stage in a sales cycle. In addition to establishing a good understanding of the needs of the customer, the salesperson is also assessed on positioning your company and its products and, importantly gaining permission to go back to the customer with a plan, proposal or recommendations.
The New Offer meeting	To promote a new product, offer or promotion. This template is to be used for evaluating a sales call where the objective is to promote a new product, offer or promotion. It assumes that after this call, there will be a further stage of background work to produce a proposal of some kind and that a further call or meeting will be required to close the sale.
The Closing meeting	This is specifically to close a sale at the end of a sales cycle. This template is to be used for evaluating a meeting where the objective is to close a sale. This will be appropriate at the end of a sales cycle where some previous activity with the customer has taken place and there is some form of proposal on the table.

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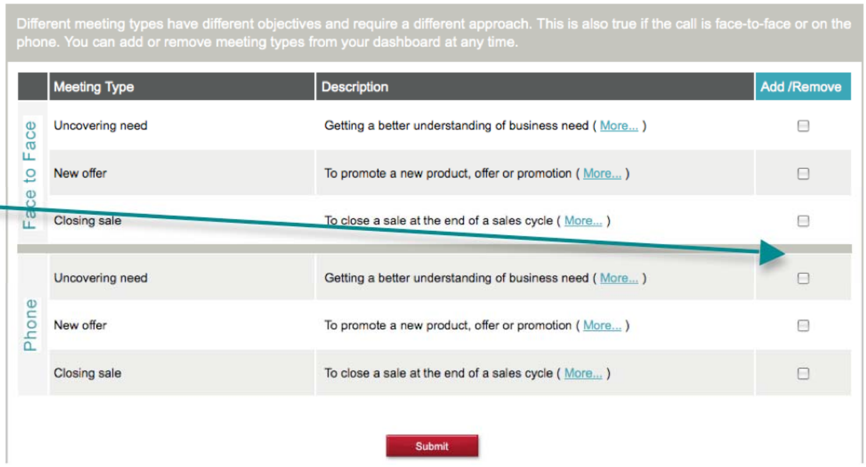
Add/remove meeting types

Click to add or remove

Meeting types added will appear on your Dashboard



Using the Dashboard

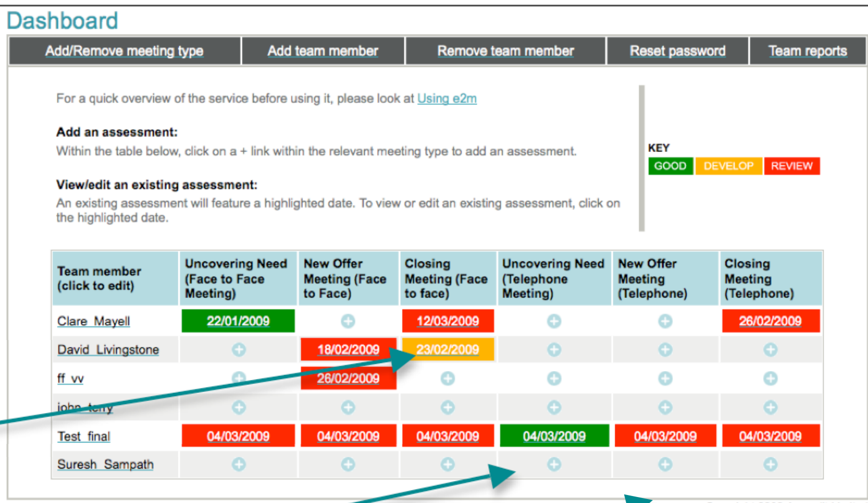
Your Dashboard shows the status of your team, your team members and the range of meetings that the team has with their customers. The most recent meeting assessment is shown using Red, Amber or Green to reflect the meeting score.

For example, the latest assessment for this person was on 12/03/2009 and the overall result of the assessment was 'review' (Red)

This assessment was on 04/03/2009 and the overall result was 'Good' (Green)

No assessments for meetings of this type have been done for this person

Clicking on a cell shows the individual's assessment scores, enables you to add new scores, manage a sales person's objectives or review performance trend reports.



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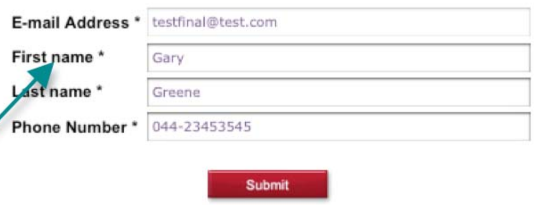
Edit Team Member details

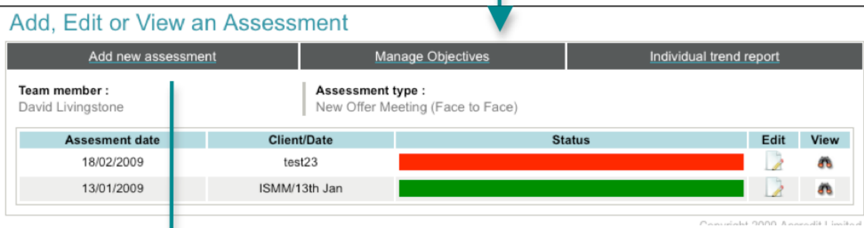
Clicking on the team member's name will open a window which will enable you to edit their personal details



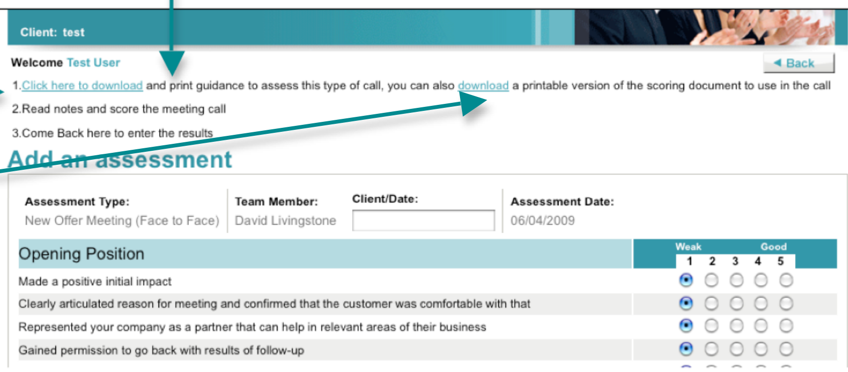
Add an Assessment

Click on any cell to add an assessment for the individual and for the appropriate meeting type.

The next screen allows you to Edit or view a previous assessment or, as in this case, add a new one.



Each type of an assessment comes with a comprehensive guide that shows you how to score and analyse performance. Click to download the guide and then print. You can also download and print a version of this scoresheet.



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Scoring the meeting

There is a scoring sheet for each of the types of call. Ensure you use the appropriate scoring sheet.

Initially, you will find it helpful to print out the sheets in advance to use at the meeting.

You can use the sheets when you observe the call or meeting, marking each of the sections as you progress. Alternatively, you can make notes during the meeting or call and complete the sheet afterwards.

For each of the individual areas, look carefully at the examples or questions. Then mark each section according to the following guidelines:-

Opening Position

The sales person should be "in control" of the meeting from the outset. The first minute of a meeting usually sets the tone for the whole meeting. The sales person should be engaging, show the appropriate level of formality and make it clear that the meeting has a purpose and that it will be of value to the attendees.

Made positive initial impact

1	2	3	4	5

- Positive body language
- Outlined agenda
- Clearly in "control" of the meeting

Clearly articulated reason for meeting

1	2	3	4	5

- Did they explain why they were there?
- Did they position it as valuable to the customer?
- Did they get agreement to the purpose of the meeting and that it would benefit the customer?
- Did you feel there was a shared agenda?

Represented your company as a partner that can help in relevant areas of their business

1	2	3	4	5

- Did they position your company's full range of capabilities?
- Did they positively position your company as a partner rather than a supplier?
- Did they confirm that the customer saw any value in this?

Score Definitions

① They did not attempt this at all. They completely failed.

② They made very limited effort to make the step, perhaps after prompting.

③ They did do what was required, but only just. There was no spark.

④ They did what was required to a good standard - you observed a strong level of engagement between the sales person & the customer

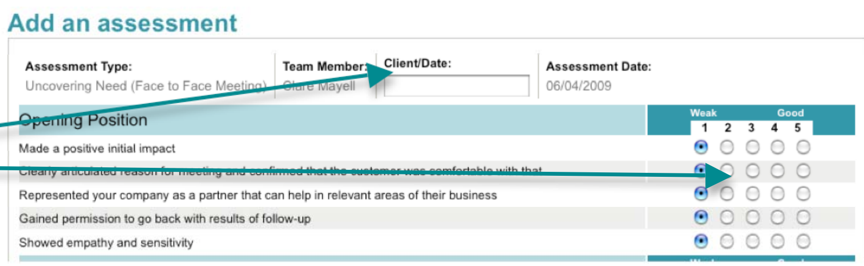
⑤ They excelled at doing this – they did everything they could and you felt that they were truly engaged.

Transferring to system

As soon as possible, transfer the 'scores' to the website.

Enter the client name and date in the box and then click to enter the appropriate scores

Make use of the comments section at the bottom of the webpage



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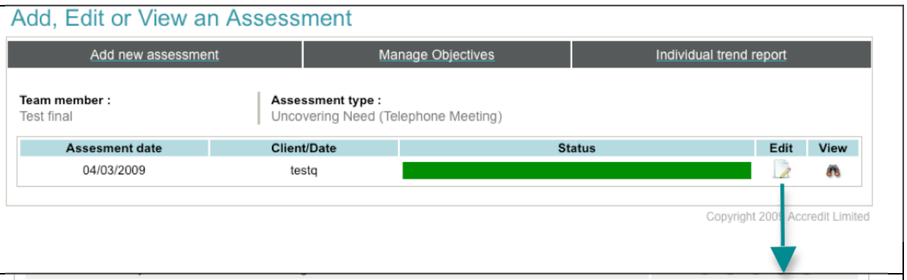
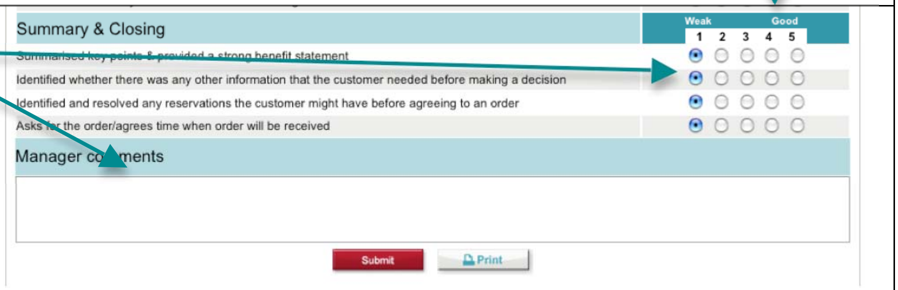
Edit an Assessment



You can edit scores and comments, then submit the revised page



View an Assessment

This page shows the detail of the assessment with an overall performance rating.

Look at our Coaching Resources. These provide a great set of tools and techniques to help you to improve the quality of your coaching.

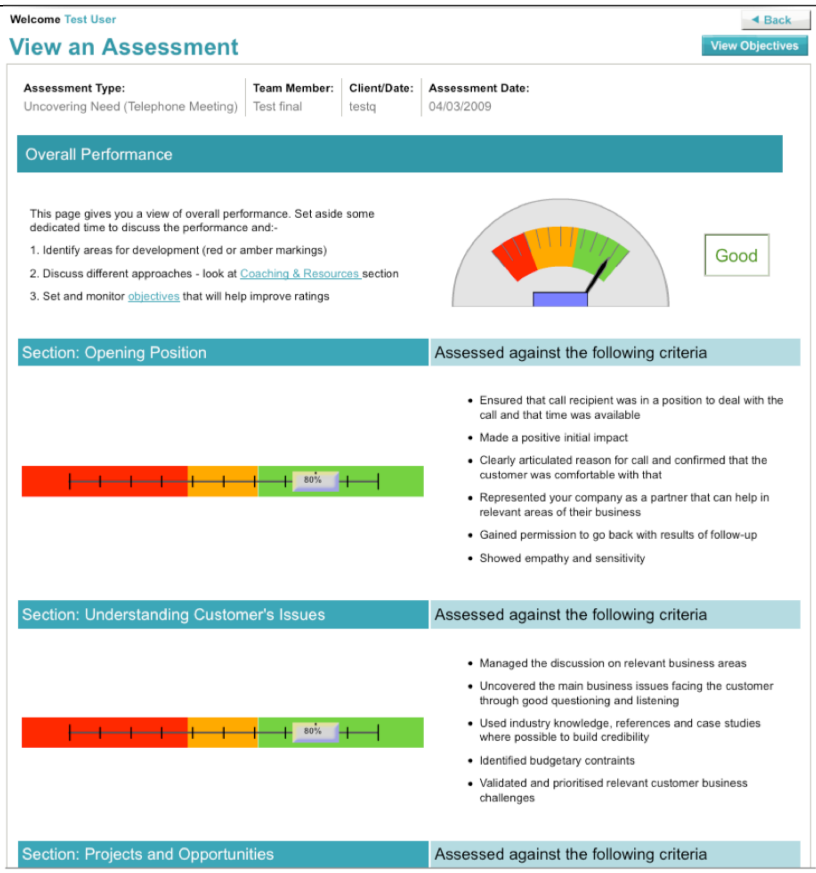
Review areas for development and decide on which area you are going to focus. Focus on one area at a time. Look at our other coaching resources for relevant material.

Review objectives set at previous meetings to ensure progress.

Discuss development action and agree at least one objective and enter the details of that objective onto the system.

Fix a date in your diaries for the next assessment and/or 1:1 to review progress. We recommend that you observe at least one call a month with each of your team.

Ensure you reward progress with positive feedback to the individual and share best practice amongst the team.



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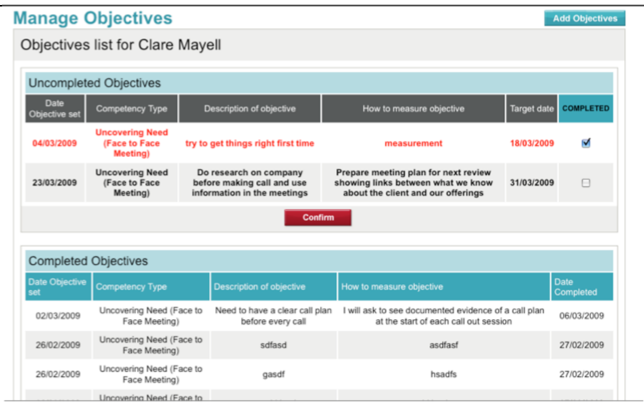
Manage Objectives

Review previous objectives

Mark those that have been completed

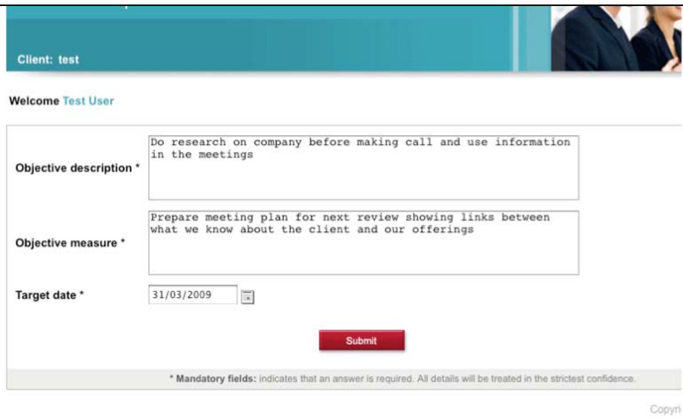
Document the objective that was agreed at the review meeting



Add Objectives

Relevant objectives should be set at every review meeting

Objectives need to be measurable and timebound. For example "by 30th September update all opportunities in my pipeline to show %age chance of winning"



Coaching & Resources

Accredit has developed a range of powerful but simple-to-use resources that all sales people and managers can use to help make them more successful. These are based on our extensive work developing sales effectiveness in large and small organisations. They can be used at any time but can be most effective in a coaching environment, after using e^{2}m to reviewing a meeting.

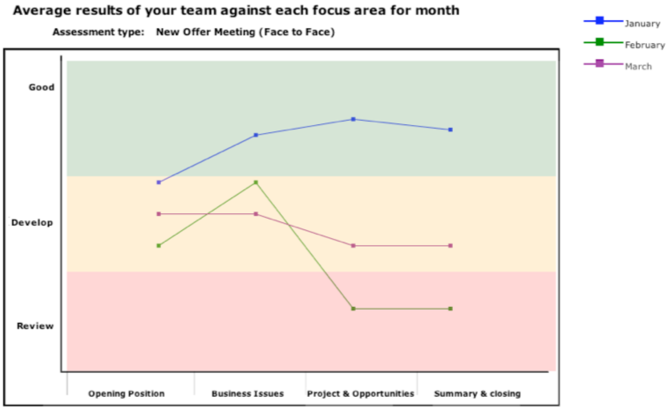
They are available as flash presentations, with a commentary or as static pdf presentation

Team Reports

Using e^{2}m

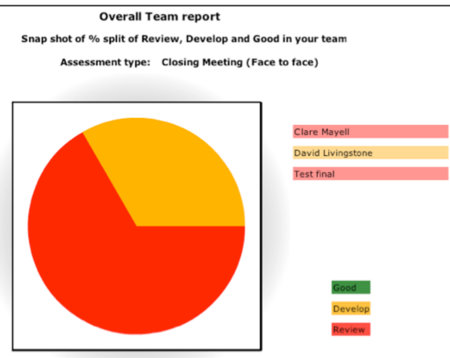
Trend Report

The Trend report shows how the performance of the team has been changing over time. In this example, the team's performance in January was good across each of the 4 areas, dropped significantly during February and recovered slightly, as far as Projects and Opportunities and Closing were concerned, in March.



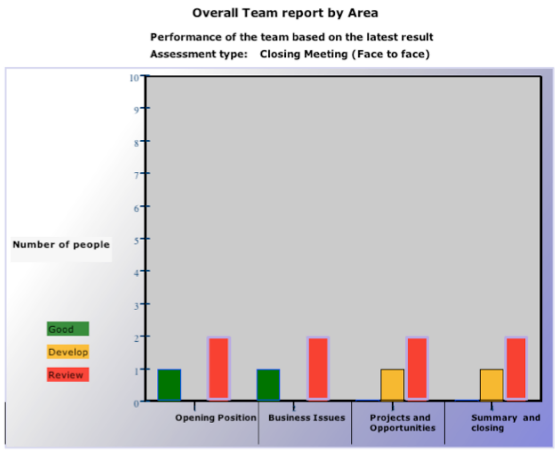
Overall Team Report

This report shows that, in terms of the overall performance, 33% of the team are in 'Review' status (Red) and 66% are in 'Develop' (Amber). Their names are shown.



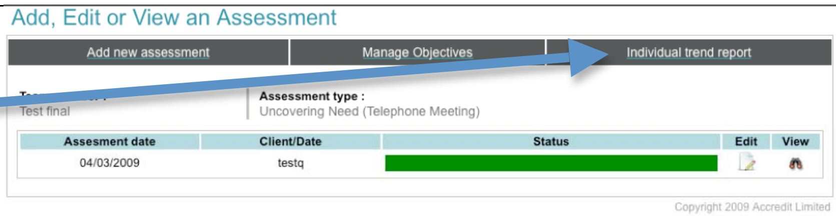
Team Report by Area

This chart looks at the four specific performance areas (Opening Position, Business Issues, Projects & Opportunities, Closing). It shows how many people in the team are in each of the 'red', 'amber', 'green' status positions



Individual Trend report

This is accessed through the 'Add, Edit or View a report page



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This shows, month on month, performance in each of the four focus areas