Move the Middle. Set Smaller Goals. (Part II)

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We believe that the greatest potential to propel your sales results lies in moving the middle 60-70% of your organization. Recently, we delivered recommendations on how to move the middle of your sales organization by coaching. Here, we'll further explore this by focusing on setting smaller goals—baby steps, if you will—which can help your sales force gain confidence, achieve incremental wins, and stay on track.

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We have strategically narrowed down examples of how to set smaller sales goals to our top three recommendations. This is based on ease of implementation and where we think you will see the greatest lift and garner speedy results.

Set Action Goals.

Most sales teams' goals are focused on numbers and percentages—and rightfully so. However, it is action that gets to the winning sales numbers. Your seasoned, top 10% has already figured out what action to take to get to their winning numbers. But your middle is not there yet. They may be struggling with a host of time management challenges, from time spent in training to time sending emails.

Based on your sales cycle, there is a preferred cadence and time investment in each phase that delivers closed business. By examining historical sales cycles, you will be able to see your best-case scenario sales actions. From there, you can help your team manage their time and create the right, winning activities and timelines.

A few examples of activity-focused mini-goals are:

- The number of emails sent (that lead to a new discovery call)
- The number of discovery calls
- The number of face-to-face presentations or product demos
- The number of networking or industry events attended (that lead to a qualified lead)
- The number of product training courses completed
- Upselling to an existing client and/or taking an existing client to lunch to keep the relationship strong

Principally, you are working backwards from the close of the sale to turn a potentially intimidating revenue goal into manageable steps that can be celebrated at each phase. Not only will this grow confidence and positive morale, but it will allow you to troubleshoot with struggling reps more easily.

Monitor Progress.

Tracking goals can be cumbersome for managers, and communicating the status even more so. But tracking goals are vital to your success, and if your reps know where they stand to goals, KPIs, etc., then they can course correct to win.

There are many ways in which companies track sales progress, from traditional Excel spreadsheets to sophisticated CRM software. The one tool we find extremely effective is a visual Dashboard. This tool can be updated in real time and is easily customized to show team and individual goals.

Why we like **Dashboards**:

1) **Readability.** A dashboard is easy to read. Appealing to both left- and right-brained reps, dashboards offer both visual and analytical data, making it easy to see exactly where you stand. In the past, users would spend large amounts of time reviewing and analyzing different reports to understand their standing. This tool allows everyone to see it clearly at a glance.
2) **Customizable.** Dashboards can be customized by users and expectations. Each decision-level dashboard can be customized to present the most valuable and useful sets of information. This allows each person to see the level of detail they need to get the job done and meet their goals.
3) **Mobile Optimized.** Most dashboards are programmed to suit any mobile device. The idea is to reach your team anywhere, in a timely manner, with the most accurate information.

Dashboards are not difficult to connect to your sales data for accurate reporting. There are many software applications that do this, and often incentive companies have their own technology to do this.

Offer Meaningful Incentives.

As we mentioned in Part I of our Move-the-Middle recommendations, most companies spend the majority of their time focusing their incentive rewards on the top 5-10% of their organization. If you are going to move your middle and focus on smaller goals, then it's helpful to offer smaller, agile, and meaningful rewards. This gesture sends a message to your team that says you are committed to their success! It reinforces positive performance behavior and inspires them to reach and stretch beyond the year-end quota.

To do this effectively, it is important to understand what motivates your reps outside of cash (which we do not recommend be used as a reward). For example, if your team is health conscious, offering small rewards, such as a healthy smoothie gift card or gym membership would be meaningful and support a work/health/life balance. Or, the focus could be on a team goal. Winners might walk away with a team happy hour or tickets to a sporting event or rock concert, where they can feel rewarded and have an opportunity to bond.

Many rewards can be presented which carry little-to-no financial cost. For instance, earning additional vacation days, a prized parking spot, or the opportunity to attend an industry conference holds inherent value without incurring additional costs.

Most importantly, don't forget the power of time with leadership. See how excited your team will get to win a private dinner with the CEO! This example offers considerable prestige and bragging rights, while undeniably stating, "We want to see you succeed."

No matter what your reward choice may be, remember to thoughtfully include the promotion of the reward in your incentive design. You want to make sure the reward not only drives behavior, but brings with it recognition from upper management.

In summary, we believe that the greatest potential to propel your sales results lies in moving the middle 60-70% of your organization. By setting smaller goals with mini-incentives, you can help your sales force gain confidence, achieve incremental wins, and stay on track.
