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Quick Guide: Build Your Agency Sales Program

10 steps to a high-performing sales program

If you downloaded this quick guide, chances are you recognize your agency or consultancy won't meet its growth targets if you rely solely on word-of-mouth referrals and expansion of existing accounts. Instead, you realize you need to identify new prospects, nurture new opportunities, and close new deals. Follow these 10 steps to build a high-performing sales program.

1 Define your sales goals

- How much in sales bookings do we need to close to hit our revenue target?
- What other supporting sales goals should our team aim to hit? (e.g., average deal or customer upsell targets)

2 Create your sales budget

- What is our budget for base salaries, and how will we structure our bonus/ commission structure?
- How much budget can we set aside for other sales necessities, including software and technology, training and professional development, and travel costs?

3 Build your sales team

- What sales team structure do we need to reach our sales goals? (Note: Every agency should have at least one fully dedicated sales resource.)
- What is our onboarding and hiring plan for these employees?

4 Choose and implement sales technology

- What sales technology (e.g., CRM) does our team need to do its job effectively?
- How do we ensure we implement this technology thoughtfully and effectively to set us up for success?

5 Identify your target market

- Who will sales target with its outreach, and what is important to know about these people?
- Who, specifically, are we excluding from our sales targets? (E.g., a particular industry where you have had little to no success).

6 Document your value prop for each sales target

- What sets us apart from our competitors, and how can we leverage this in our messaging?
- How are we weaker than competitors, and how can we combat objections related to this?

7 Align sales and marketing efforts

- How do we align our sales objectives with our marketing objectives and vice versa?
- How will we develop a strong working relationship between our sales and marketing teams?

8 Define your prospecting strategy & get started

- How often will we run a prospecting campaign, and how will we decide who to target each time?
- What combination of channels and tactics will we use to reach prospects?

9 Gather important information during prospect meetings

- What questions should our team ask during every prospect meeting?
- How do we ensure our sales team enters critical prospect data into the CRM after every meeting?

10 Meet regularly to review sales scorecard

- Which KPIs should we include on our sales team scorecard? What about individual sales team member scorecards?
- How frequently will we meet to review our scorecard, and who should we include in that meeting?

Is your agency ready to get serious about sales? We'd love to chat if you'd like to see how Parallax can help you add more structure to sales and stabilize business operations.

Get in touch at getparallax.com

4600 W 77th Street | Edina, Minnesota 55435 | yo@getparallax.com | www.getparallax.com