Sales Representative Recruitment and Development

Keys to Hiring the Best People for Your Service Provider Business—and Setting Them up to Succeed

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About This Document: Developed by the CA Service Provider Center of Excellence

This document has been written by the CA Service Provider Center of Excellence team and is intended to provide our service provider partners with guidance into addressing some of their most pressing challenges. Our team has rich expertise in service provider businesses, strategic consulting, technical deployments, sales and marketing. Our documents are informed by the Center of Excellence team’s extensive experience over the past ten years in helping build successful service provider businesses, and by interviews with some of our most successful service provider partners. The document is provided for informational purposes only and on an as-is basis: the guidance and results described herein are based on the unique experiences of our staff and partners, and may not be applicable to all organizations.
Executive Summary

Challenge
The degree to which your organization succeeds will ultimately be predicated by how effective your organization’s sales efforts are. Written specifically for service provider executives, this paper offers a detailed look at the specific requirements of effective sales representatives, and it delivers in-depth guidance into finding the right sales reps for your organization. In addition, the paper provides comprehensive insights for building the organization and resources that can maximize the chances of your business’ sales success.

Introduction
As executives seek to establish and expand their service provider businesses, they need to start with several key pillars, including a viable business plan, valuable offerings and an effective, scalable services foundation. Once these pillars are in place, it is vital to build an effective sales team. No matter how great the value of your services and people, ultimately, your business won’t succeed if it can’t consistently win new business. A strong sales team can help articulate your organization’s value proposition, and ultimately fuel your organization’s growth and success.

When it comes to building your sales team, the stakes are high. While any hire is important, especially for an early stage service provider, starting with a strong sales team is critical. Mistakes in a sales hire can lead to lost recruiting and training costs, severance costs, gaps in the sales funnel, lost opportunities and potentially time spent doing damage control in prospect accounts.

Hiring sales talent is vital, and it’s certainly not easy. For any company, finding and retaining productive sales representatives is difficult. This is particularly true in service provider organizations, which have unique sales cycles and cultures. To effectively sell managed services, reps will need to meet a range of specific requirements and qualifications, which will reduce the size of the resource pool a given provider can draw from. Further, the specific needs of a given provider will vary depending on target markets and the services sold, which can also serve to narrow the number of potential candidates available.

To help service provider leaders who are struggling with these challenges, the CA Service Provider Center of Excellence has developed a sales recruitment and development model (see figure A), which depicts the key elements required to effectively recruit and grow top sales talent. This model has been designed to help service providers find the right sales reps and foster their development so they ultimately deliver optimal contributions to the business.

The model covers attraction and recruitment, and it also highlights what to look for in a sales rep, their DNA. Once hired, you need to deliver the product/service knowledge and skills and competencies that will equip the sales rep to thrive in their specific role. Finally, the model also details the specific foundational elements that foster sales success, including effective compensation, incentive plans, coaching and mentoring and sales-enablement resources.
Sales Recruitment and Development Model

Figure A.
This model outlines the key elements that are required to realize success in selling services, offering insights for recruiting the right sales people and equipping them with the right resources, tools and incentives.

In the following pages, we provide some practical guidance for applying this model to your organization. We offer insights into finding the best sales representatives for your organization, and for putting your sales team in the position where they, and your business, have the best chances of success.

Defining Who the Right Candidate Is

Before any efforts are put into recruitment, it is essential to take a detailed look at the specific skills, competencies, experiences and responsibilities that will be sought in each of the roles being filled. This includes distinguishing between the key capabilities required of an account rep and those of a sales team or territory manager. Also, you shouldn’t let these definitions get static; your organization’s requirements for sales talent will vary, and it’s important to stay on top of near- and long-term needs as they evolve.
Due to the complex nature of managed service sales, you will not always find candidates who are an exact match with your requirements. In fact, many of the top sales reps we’ve worked with in the past have grown into their role, and were given the initial opportunity because the hiring manager felt they could evolve to meet the requirements of the open role.

As you begin to define the ideal candidate, it’s important to recognize that there are a number of approaches service providers can take when sourcing sales talent. The following is a high-level overview of the different approaches and their respective pros and cons:

- **Exact match.** In this scenario, you’re hiring a sales rep that has direct alignment with your requirements. In essence, when they move to your organization, they’ll be working with the same type of company, and doing the same type of work they’ve done before. There are obvious advantages to this approach. Most importantly, they will have direct experience, should need very little training, and may bring a client base with them to help kick-start their activity. The downside is that hiring this type of candidate will typically be more expensive; the candidate will know they’re a fit and command a salary commensurate with that reality. In addition, there may be some potential concerns around the candidate’s motivation, or lack thereof, by effectively making a lateral move to another organization.

- **Promotion.** In this case, the position you’re looking to fill will represent a step up for a candidate, a move to take on similar work, but at a higher level. The positives with this approach are that the new hire will command a lower salary than the candidate that is an exact match, and there will tend to be a larger pool of candidates to choose from. Hiring a less experienced rep may be ok, but you need to ensure they have the capacity to learn, and learn as quickly as your business will require. Ultimately, this hire can come with more risk: the candidate hasn’t yet proven they’ll be able to succeed in the new level of responsibility. Further, they’ll require a bigger investment in training in order to start being productive, which exacerbates the penalty of making the wrong hire.

- **Adjacent experience.** When making this hire, an organization is selecting a candidate that has similar experience to that required in the new role. For example, a service provider that sells into the healthcare market could hire a sales representative that hasn’t worked for a service provider, but that has experience selling into the healthcare industry. When adopting this approach, a service provider can draw from a much larger group of candidates and may not have to pay the higher salary of someone with more direct experience. The downside is that this hire will require more time and energy to train, which will also entail assuming more risk.

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**When It Pays to Diversify**

If you are looking to fill several open positions, you may want to consider diversifying the qualities of the candidates you’re targeting as this can enable a broader complement of sales attributes and expand the scope of strategic selling mixes and approaches available. For example, this can include hiring some reps from inside as well as from outside the industry, selecting highly technical as well as nontechnical reps and bringing on both younger and more seasoned candidates. Having this diversity of backgrounds can ultimately make for a stronger team.
When defining the attributes of the candidate desired, it is important to understand the specific requirements and characteristics of selling a service. This is particularly true if your organization is in the midst of making the transition from being a value-added reseller to adopting a recurring, managed services model. The characteristics and attributes that make sales reps effective at selling products won’t necessarily make them effective at selling services. In fact, the makeup of the ideal candidate for each of these sales roles can vary dramatically. Compared to selling products, selling services is typically more consultative in nature. Ultimately, selling managed services is about selling trust, fostering confidence in the prospects’ minds by building a relationship with them and convincing them that they can rely on your organization to support critical IT services. Trying to take transaction-focused reps and approaches and apply them to services sales will be prone to failure.

Understanding What to Look for: The DNA of a Successful Sales Rep

In looking to find the right sales rep for your organization, there are three dimensions to consider:

• **Aptitude.** The inherent mindset and characteristics the candidate brings to your organization.

• **Experience.** The roles your candidate has held prior to joining your organization.

• **Key Skills and Competencies.** The talents and capabilities the candidate has developed.

The following sections describe the key factors to consider in evaluating these respective attributes.

**Aptitude.**

In evaluating the fit of a prospective candidate, there are several key aptitudes to look for:

• **Persistence and drive.** As the saying goes, the selling starts when the customer says no. Successful sales reps will demonstrate persistence, and have the drive to succeed, even after being ignored and routinely having offers declined.

• **Integrity and customer focus.** Effective reps will make a commitment to building credibility and trust with the customer. Maintaining a long-term view of the relationship that is genuinely driven by concern, both for the service provider’s and the customer’s business, helps to build that trust. Strong reps will instinctively want to react promptly to inquiries and requests, and they’ll anticipate and proactively seek to address customer needs.

• **Consultative.** Reps need to listen closely to prospects, ask qualifying questions to understand customers’ pain points, empathize with their challenges and be committed to helping them meet their objectives.

• **Self-awareness.** Successful sales reps will understand their personal strengths and weaknesses, seek feedback, be open to constructive criticism and gain insights from mistakes.

• **Accountability.** Rather than looking to point fingers or assuming others will do what’s required, effective sales reps will take personal responsibility for the customer’s ultimate satisfaction. They’ll mobilize other internal resources to respond to customer needs, for example, so they can get the customer a quick response, even if they don’t personally know the answer.
Successful sales reps will also tend to be effective problem solvers, negotiators, communicators and leaders; good at multi-tasking; and positive, flexible and helpful team members.

Experience.
Finding candidates that have the right employment background is also essential. The following are a few key aspects to evaluate:

- **Role.** As outlined earlier, a big part of services sales hinges on the rep’s ability to establish and cultivate trust. Toward that end, prior service provider experience and deep technical expertise is vital. It can often be optimal to bring in candidates that have a background in a service provider’s operations and service delivery teams. This kind of background can be invaluable in helping build confidence in the expertise of the service provider organization. Quite often, it is the technically savvy team members that can effectively multi-task that make the best sales reps.

- **Organization size.** It is important to look for the right background in terms of the past organizations that a candidate has worked with. As outlined earlier, prior service provider experience is vital. However, it is important to understand the size of companies the candidate has worked with, and assess whether that background maps to your specific requirements. For example, a sales rep that has a track record of success with huge service providers won’t necessarily be a fit for your business if it’s a small, early-stage organization that doesn’t have the same array of resources, staff support and infrastructure the rep is accustomed to.

- **Culture.** Cultural fit is also important, and something that is frequently overlooked by hiring organizations. Look at both the candidate and his or her past organizations, and try to assess whether there’s a cultural match. For example, if your organization has developed hard-wired processes and workflows, make sure a candidate is comfortable working within that kind of structure.

### Key Skills and Competencies

In evaluating candidates, look for the following skills and competencies:

- **Product and service knowledge.** It’s vital that a sales rep understands your product and service offerings and their features and benefits. Further, it’s important they understand alternatives available in the market, and the respective strengths and disadvantages they offer.

- **Market and account knowledge.** Look for sales reps that can identify how offerings address customer needs. Endeavor to find reps that have knowledge of your target accounts, including their technologies, businesses and industries.

- **IT proficiency.** To be effective, sales reps need to have an understanding of the technologies employed in customer environments, the technologies being offered and the broader technological landscape.

- **Financial acumen.** To sell to business leadership, it’s important to be able to determine the financial value of an offering and to articulate that value in a credible and compelling way.

- **Selling skills.** It’s vital that sales reps can effectively execute each of the steps involved in the sales cycle, from initial outreach and overcoming objections to post-sales follow-up. Sales reps also need to master the consultative selling approach.
• **Territory management.** Sales reps should have a proven ability to manage their territory and accounts and produce impressive sales numbers. Effective account management also requires strategy, focus, process and accurate forecasting. Communications with accounts in all stages of the sales cycle need to be targeted, accurate and timely.

## Recruiting the Best People

In building an effective sales team, sourcing quality candidates is vital. In this section, we provide insights for recruitment, including both higher-level strategies and some insights into tactics.

### Recruitment Strategies

To realize maximum success in your recruiting efforts, you should look to pursue some of the following high-level strategies:

- **Harness the recruiting power of happy employees.** When it comes to attracting and retaining the right people, happy employees can have a multiplier effect—representing the best way to attract qualified new talent. In this regard, it’s important to view employees like clients: They need to be willing to act as a reference for your business. Whether when out at lunch, on vacation, on the train or anywhere else, employees need to be telling positive stories about your business, its culture and its prospects. With so many service provider employees embracing social networking, this positive, employee-generated buzz can be even more powerful in terms of its reach and impact. Also, an incentive-based employee referral program can be a key driver in attracting top talent to the organization.

- **Recruit by engaging in the community.** It is also important to be part of the service provider community. Today, there are forums, groups, conferences, panel discussions and a host of other arenas in which you can participate in this community and contribute to its advancement. By gaining visibility as an expert and a contributor, you and your organization can enjoy a range of benefits, including getting help with recruiting. This exposure in the community can help boost your visibility and that of your business, and it can help establish a positive reputation among other service providers, many of which may be strong candidates for future openings. Especially with today’s technology-centric, social networking-centric generation, participating in the community can really aid recruiting efforts.

- **Nurture and recruit from within.** Some of the best sales talent is inside your company today. Service provider executives need to make employee development a priority. This is key for two fundamental reasons: First, the managed services segment hasn’t been around long. There are only a select number of professionals with managed services experience, so it makes business sense to be committed to growing talent and recruiting from within. Second, staff members often have demanding jobs. There will be a lot of stressful moments, and it takes dedication and commitment to get through those times successfully. Showing people that you’re dedicated to advancing their careers, that you’re willing to help better their future, is a tangible way for the business to demonstrate that the commitment goes both ways. By investing in their future, management will help staff feel more vested in the business’ future.
Recruitment Tactics

The following are some insights for the various tools and techniques available in your recruiting:

- **Website.** When open positions are available, be sure to feature them prominently on applicable areas of your corporate website.

- **Professional networks.** Business networking sites such as LinkedIn can be invaluable recruiting tools.

- **Networking.** Be sure to leverage your team’s presence at trade shows, corporate events and other meetings to build your network and establish the contacts that could be your next hire, or put you in touch with that person.

- **Competitors.** Often, competitors’ employees will have the most relevant experience and talents, so competitors, especially those in some sort of turmoil, can be fruitful areas in which to target recruiting efforts.

Evaluating Candidates

As you build a list of prospective candidates, a trickle can quickly turn into a flood. Weeding through the list of contacts to find the subset of the most qualified candidates can be very time consuming.

In this effort, it can be a huge benefit to leverage a professional recruitment support service. This type of service can help substantially in filtering through large candidate lists.

Managing Interviews

In interviewing candidates the following are a few critical factors to consider:

- **Sell the company and the position.** During interviews, it is important to recognize that selling needs to go both ways. Candidates need to sell their background and talents, and you need to sell the value of your business, including its culture, people, potential and opportunities.

- **Consistency is key.** To effectively sell the candidate on the opportunity, it is critical that they hear a consistent story from every company representative they speak to. Therefore, it is important to have a well-defined value proposition that is well understood throughout the organization. Everyone in the organization, and particularly everyone involved with interviewing candidates, should be able to clearly articulate the five key reasons customers choose the service provider. This is essential in helping make sure that candidates hear a consistent, compelling story.

- **Formalize the process.** The development and use of formalized interview and evaluation tools and processes is a recruiting best practice. By providing interviewers with a complete list of questions, your organization can make sure that all key criteria are addressed during the interview process. (For more information, please reference the appendix, which offers a checklist of the aspects to consider in evaluating candidates.)
Sales Team Development: Leading an Organization Optimized for Success

Once your organization has hired the best sales people, how do you position them to be successful? Fundamentally, successful sales rep development starts with leadership. Executives need to make sales rep development a priority and invest time and resources accordingly. The following are a few key requirements and approaches that you should adopt as the leader of your service provider business.

Be Sales Focused

To cultivate a strong sales organization, leaders need to be focused on sales, consistently engaged with the sales team and out in the field, where they can help prepare and guide staff. Toward this end, it is critical, even early in the maturation of your service provider business, that you separate sales leadership from operations leadership. Find someone who can focus on day-to-day operations and one person that can focus solely on sales. While this can be hard for a founder to do, often, it’s easier to find someone who’s strong operationally and that can manage the engineering and service delivery teams, than it is to find someone who can quickly come in and run your sales efforts.

Leading and Selling

Whether yours is an early stage or mature service provider organization, it’s vital that executive leadership themselves have solid sales and mentoring skills. If you’re currently managing the role of sales leadership, it is important that you take an honest look at your aptitude, experience and skills and determine whether you’re the right person to be in that role long term, and, if not, find someone who is.

Be Effective Sales Mentors

While time is precious for any service provider executive, coaching and mentoring sales reps in your organization is a vital effort that needs to be prioritized. Take time and cold call with the new hire. Join reps on sales calls and meetings, whether the opportunity is for $1,000 or $50,000 a month. This kind of involvement sets the tone that sales is a priority and helps build an effective, sales-centered culture in your organization. That $1,000-a-month opportunity could ultimately become a $50,000-a-month opportunity.

To be effective sales mentors, your leadership needs to:

- **Understand which reps to focus efforts on.** It’s vital to know existing staff and prioritize mentoring efforts on those reps who need it most. For example, look at which reps are good at opening doors and which are effective at consultative sales. Understand the differences and focus on equipping reps with the tools they need to become effective consultative sales reps.

- **Know when and how to get involved in deals.** As mentioned earlier, involvement is critical, so leaders can provide personalized insights that reps need, whether that involves refining account call strategies or tactics on specific calls. However, this involvement needs to be done in a truly coordinated, collaborative way. If sales reps feel like their autonomy or authority are being undermined, or, worse, the prospect sees disjointed efforts in which reps and management aren’t on the same page, executive involvement can backfire.
• **Help improve key skills.** Effective mentorship will ultimately pay off where it counts most: helping reps build and refine their key capabilities, such as closing techniques and listening skills.

• **Understand the difference between coaching skills versus attitude.** As mentioned earlier, selling managed services is about selling trust. Your reps will need to convey a positive attitude to build this trust with prospective and current customers. Cultivating the right attitude among reps is very different, but no less vital, than coaching reps on the specific steps they need to take to close a deal. Failure to identify and focus on each of these dimensions may lead to challenges in the acquisition of new customers.

• **Provide constant training and market education.** The better trained and more knowledgeable your sales force is, the more successful they will be. Engaging with sales reps to help provide instruction will also create a dialog that will help management understand if they are providing the right tools and products to win in the market.

**Have Strong Sales Skills**

Whether yours is an early stage or mature service provider organization, it’s vital that executive leadership themselves have solid sales and mentoring skills. Strong, seasoned executives that can step in to assist in the sales process can often be that critical factor that helps win the bigger deal or the larger account. If you’re currently managing the role of sales leadership, it is important that you take an honest look at your aptitude, experience and skills and determine whether you’re the right person to be in that role long term, and, if not, find someone who is.

**Be Patient**

As outlined earlier, selling services is very different from selling products. Service provider sales reps ultimately need to establish relationships and build trust, and this takes time. For many organizations, it is not uncommon for it to take a new sales rep 6-12 months to become fully productive. Sales leadership therefore needs to be patient and ensure they give reps the time they need to be successful.

**Track Performance**

While patience is a must, that doesn’t need to equate to blind faith. Like it or not, not every sales hire will ultimately work out. In order to mitigate the damage and most quickly change course, it’s important to ascertain any mistakes as soon as possible. Toward that end, provide reps with every opportunity to succeed, but set milestones and thresholds to track progress so you can effectively assess performance early on. While you can’t expect business to close immediately, you can track such quantifiable metrics as meetings conducted, RFI responses and closing ratios. Establish metrics to monitor development and gauge success.

**Foster Continuous Learning**

When it comes to training and mentoring, your work is never done. This is a necessary investment, and it needs to be done in a continuous, ongoing manner. Reps can always learn new skills, get better acquainted with evolving technologies and markets and so on. Therefore, it is important to institute the workshops, programs and other efforts that can cultivate the continuous learning of the sales team.
Establishing Effective Compensation and Incentives

Establishing the right compensation plans and incentives is integral in fostering not only sales but the right behavior that equips your business to succeed in the long term. As outlined earlier, selling services is different than selling products, and therefore, effective managed service commission plans must also be different than product commission plans. In developing your compensation and incentive plans following are some key approaches to consider:

- **Incent everyone.** During the first few years of a service provider’s development, executive leadership may consider providing some type of incentive for everyone in the organization. From the administrator that’s responsible for how orderly the data center looks when prospects come in for tours to the website administrator responsible for fixing a broken link, every employee has a role to play in the prospect’s impression of your organization. Establishing some form of incentive that motivates everyone in the organization can be a great way to get everyone working together and pulling in the same direction to maximize sales success.

- **Prioritize presales staff.** The engineers, pre-sales engineers and other staff members that are involved in the sales cycle must be provided ample incentive to help foster sales.

- **Pay based on new business.** Include an up-front bonus and a certain percentage of revenue on a monthly basis moving forward. In this way, you can help reward the rep for closing the sale and give them incentive to help grow the account over time. When starting out, understand new accounts may come at a heavy cost. The recurring revenue and customer pool to grow business is the reward. Have a financial model built to align with new business value and provide higher compensation for these accounts.

- **Pay based on profits as the business matures.** To incent optimal behavior, compensate sales representatives based on estimated profits of the business they bring in, rather than revenue.

- **Reward renewals.** When contracts are up for renewal, sales will need to get involved to ensure the customer stays a customer. When the customer renews, the sales rep should be rewarded accordingly.

Setting Sales up for Success

Even the best sales reps can’t go it alone. To be successful, they need sales enablement resources, supporting processes, tools and technical resources. This section looks at each of these areas in depth.

**Sales Enablement Resources**

The following sections provide a detailed look at the most critical sales enablement resources.

**Service Catalog**

Having a well-defined service catalog is one of the key components to helping build scalability and repeatability into your sales efforts. Fundamentally, if sales reps are to sell, they need to have a firm grasp of what exactly it is that they are selling. The service catalog is a critical element in this regard. By taking the time up front to develop formalized, structured and standardized offerings, your organization can help expedite sales reps’ understanding of your offerings, which can help speed their ability to sell. While a prospect may need some variation of the standard offering, it is still much more efficient for reps to start with a standard and make the necessary adjustments, rather than starting from scratch each time.
Reference Accounts
Having strong reference accounts is a critical success factor for service providers. Before most prospects are going to entrust critical IT services to a new provider, they are going to want to validate your services and claims with a customer. To close business, your reps will need to provide reference accounts that can validate your organization and offerings. In order to generate a list of referenceable accounts, it’s a good idea to offer bonuses for customer testimonials.

Sales and Marketing Collateral
From initial high-level capabilities brochures to more detailed white papers, effective collateral can help support sales reps throughout the sales cycle.

Value Propositions
Before a sales rep can articulate your organization’s value proposition, they need to understand it themselves. Make sure your organization equips sales reps with resources that detail the value proposition of both your company and each of its services.

Objection Handling and Financial Justifications
While the specifics of any given account will vary, it is nevertheless important to deliver training and create standardized resources that can help sales reps overcome prospect objections. This is particularly important in terms of financial objections, which can often present obstacles to closing business. Furnish reps with the tools and techniques they need to effectively articulate the financial justifications that support your service.

Target Customer Profiles
While there are inevitably going to be instances where sales arise that are ad hoc and opportunistic in nature, it is important to work to standardize sales approaches, and in this effort, defining the profiles of target customers can be invaluable. Your organization may be best served by focusing on organizations in a specific industry, of a specific size or with a specific technology, but either way, arm your reps with an understanding of the ideal prospects to look for, which can help them prioritize their efforts and build repeatability.

Qualification Metrics
Qualification metrics are vital in helping ensure sales reps and others in the organization don’t waste time on unqualified leads, but rather are focusing on efforts that stand the biggest chance of yielding dividends. Provide your reps with a list of qualification questions based on business-defined criteria. This helps reps ask the right questions up front, so they can quickly determine whether the lead is worth pursuing. Further, these qualification criteria should be leveraged in processes, so, for example, before an in-person sales call is ever scheduled or a solution architect is engaged, the rep has to document that the prospect meets specific requirements, such as having a defined project, allocated budget and so on. This can also help ensure the rep is working with the right contact in the organization, for example, either a project decision maker or sponsor, which is also critical to minimizing wasted time.
Standardized Training

Standardized training is a highly effective way to build consistency and repeatability across your sales team. This can include training on specific solutions and services, and it can also provide detailed insights into organizational processes, which is vital to helping ensure sales reps can get things done efficiently within the organization.

Sales Process and Systems

To cultivate leads and ultimately close business, sales reps need to go through a series of workflows and steps, and the better your organization supports these efforts, the more effective the sales team will be. The following are a few of the key areas to focus on:

- **Configuration tool.** Within many service providers, there can be a large number of variables that go into scoping services and establishing pricing. Wherever possible, look to establish standardized configuration tools that enable sales reps to plug in specific quantities and other variables and quickly generate appropriate pricing.

- **Contracts and SLAs.** As much as possible, sales reps should be equipped with standardized contracts and service level agreements that can, with little or no customization, be used in the majority of accounts.

- **Proposal templates.** Early on in the sales cycle, reps will need to deliver proposals and statements of work. By developing easily customizable templates for these efforts, organizations can save sales time and boost their productivity.

Technical Resources

Just about any sales rep will agree: A good solution architect is critical in winning business. Even if you have sales reps that are technically savvy, they just about always will need technical support in architecting an optimal solution for a customer. The reality is that over the course of a service sale, a lot of technical questions will arise. Especially as reps establish tenure, they’ll be able to field more questions, but ultimately, it is difficult for any one person to be an expert in everything. Having a strong solution architect or engineering team member available to participate in calls and meetings as needed to field these questions is vital in establishing confidence with the prospect and furthering the sales process.

Conclusion

Sales and revenues are too critical to leave to chance, guesswork or wishful thinking. Sales efforts are also far too important to leave to part-time staff or a single executive. For service provider businesses to succeed, they need an effective and productive sales team, and they must establish an organization that cultivates successful sales reps, repeatable sales processes and scalable revenues. To realize these objectives, executive leadership needs to make sales a priority, recruit and hire the right people and equip them with the incentives and resources they need to be successful.
Appendix: Candidate Evaluation Checklist

In looking to find the right sales rep for your organization, there are three dimensions to consider: aptitude, experience and skills. As you evaluate prospective candidates, use the following checklist to assess a candidate’s merits and fit for your business.

The information below can be leveraged to support the development of a formal interview guide and help define criteria for sales recruitment success. A formalized interview process with supporting tools can help your team conduct more effective interviews. Further, by standardizing the interview process, you can help improve the coordination of your team and the candidate’s perception of your organization.

Aptitude

☐ Persistence and drive. Has the candidate exhibited the persistence and drive required to persevere in spite of repeated refusals?

☐ Integrity and customer focus. Does the candidate have an inherent inclination to build a long-term relationship, or are they more suited to conducting transactions and moving on?

☐ Self-awareness. Does the candidate have a realistic understanding of his or her strengths and weaknesses? How will they respond to mistakes and constructive criticism? Will they try to spread blame or use errors as an opportunity to improve?

☐ Accountability. Is the candidate more likely to assume others will do what it takes or take personal responsibility to ensure the customer is satisfied?

Experience

☐ Roles. Has the candidate gained relevant experience in a service provider organization or in an adjacent market? Does the candidate have deep technical expertise required for establishing credibility and selling into our markets? Can the candidate effectively multi-task to support the multiple ongoing activities our business requires?

☐ Organization. Has the candidate worked, and succeeded, in an organization that is similar in development cycle, size and resources to ours?

☐ Culture. Does the candidate’s background and approach make him or her a fit with the culture of our organization?

Skills

☐ Product and service knowledge. Does the candidate understand our product and service offerings and their features and benefits?

☐ Market and account knowledge. Can the candidate map our solutions to customer needs? Do they know our target accounts, including their technologies, businesses and industries?

☐ IT proficiency. Does the candidate understand customers’ technological environments and how our services fit?

☐ Financial acumen. Can the candidate articulate the financial value of our offerings to business leadership?
Selling skills. Can the candidate effectively execute each of the steps involved in the sales cycle?

Territory management. Has the candidate proven his or her ability to manage a territory and accounts and produce strong sales numbers? Can they do effective forecasting and document progress?

Other Considerations

References. Did the candidate’s references provide positive feedback? In addition, consider trying to reach out to other contacts in the candidate’s network that were not provided as a reference in order to get additional feedback. What opinions do these individuals have of the candidate?

Location. Can the rep manage the commute, territory assignment and other geographical factors? How much time and expense will the business need to invest in enabling the rep to reach prospects?

About the CA Service Provider Center of Excellence

The CA Service Provider Center of Excellence delivers the proven strategies and insightful resources that can help your business boost its efficiency, profitability and maturity. No matter where your service provider business is in its evolution, count on the Center of Excellence to provide the guidance you need to more fully leverage your technologies and investments, optimize your operations, enhance your go-to-market capabilities and scale intelligently.

For more information, please visit ca.com/service-providers