SFE Nav-Lite™

Guiding the Way to a Customer-Focused Growth Engine

The SFE Nav-Lite™ Contents

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SFE Nav-Lite™

Guiding the Way to a Customer-Focused Growth Engine

SALES STRATEGY

Customer-focused strategy targeting the best growth opportunities with differentiated and mutually valuable offerings

- ■ MARKET INSIGHT
- ■ SEGMENTATION
- ■ GROWTH PRIORITIES
- ■ VALUE PROPOSITION
- ■ PRICING STRATEGY
- ■ SALES AND MARKETING COLLABORATION
- ■ LEADERSHIP ALIGNMENT

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Effective & efficient coverage of the full target account universe with a structure and deployment that best fit the value proposition and sales process strategies

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Highly motivated, performance-focused and accountable sales force committed to "getting it done" and "doing it right"

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- ■ METRICS AND DASHBOARDS
- ■ GOALS
- ■ INCENTIVES AND REWARDS

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Highly efficient support capabilities that provide the sales force with the information, expertise, speed-to-market and efficiency needed to achieve superior performance

- ■ DATA MANAGEMENT
- ■ ANALYTICS
- ■ LEAD GENERATION AND MANAGEMENT
- ■ PRICING AND CONTRACTING SUPPORT
- ■ REPORTING AND ADMINISTRATION
- ■ PLATFORMS AND SYSTEMS

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Sales performance is a consequence of decisions about the drivers

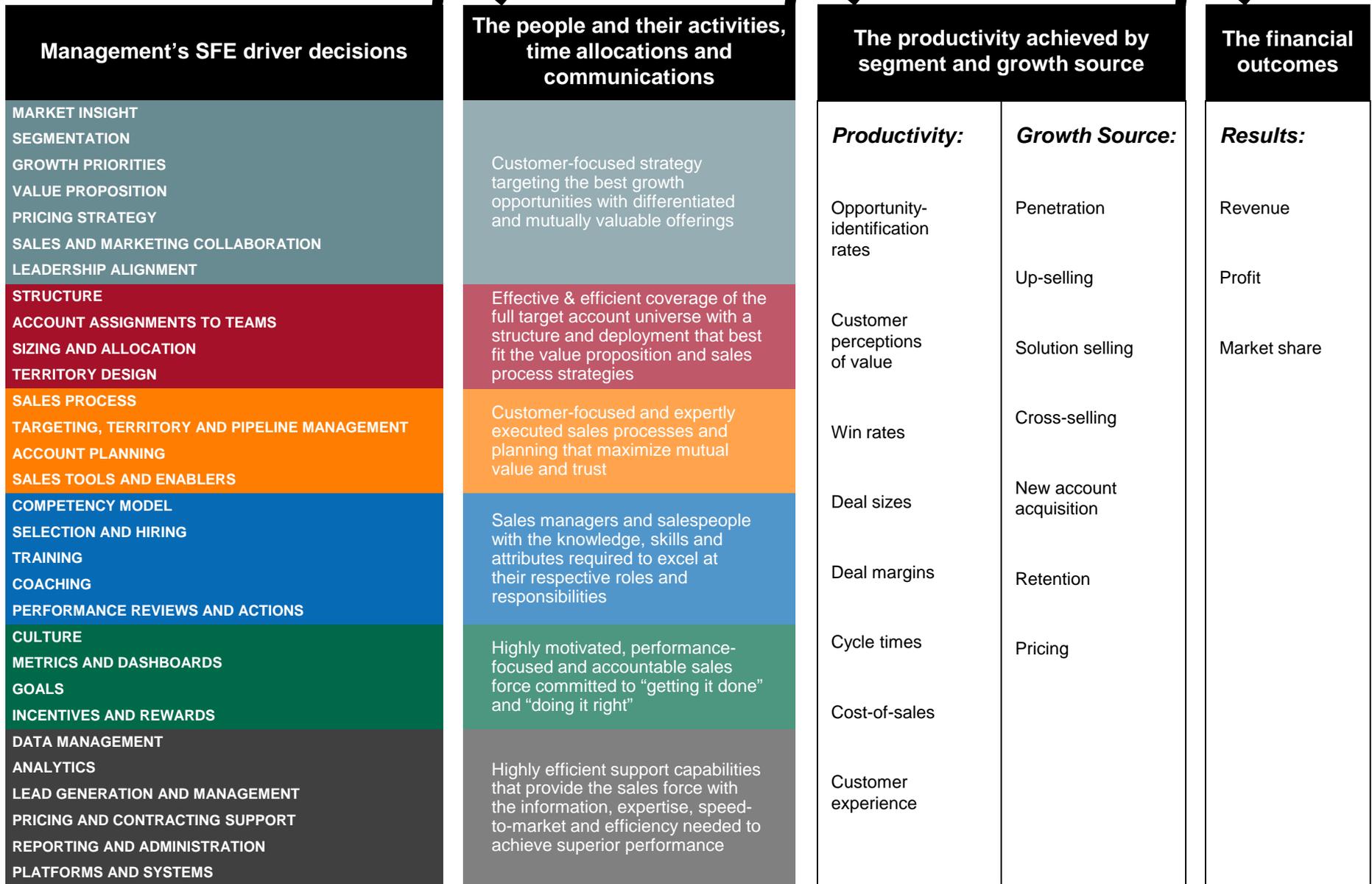| Management's SFE driver decisions	The people and their activities, time allocations and communications	The productivity achieved by segment and growth source		The financial outcomes
		Productivity:	*Growth Source:*	*Results:*
MARKET INSIGHT **SEGMENTATION** **GROWTH PRIORITIES** **VALUE PROPOSITION** **PRICING STRATEGY** **SALES AND MARKETING COLLABORATION** **LEADERSHIP ALIGNMENT**	Customer-focused strategy targeting the best growth opportunities with differentiated and mutually valuable offerings	Opportunity-identification rates	Penetration Up-selling	Revenue Profit Market share
STRUCTURE **ACCOUNT ASSIGNMENTS TO TEAMS** **SIZING AND ALLOCATION** **TERRITORY DESIGN**	Effective & efficient coverage of the full target account universe with a structure and deployment that best fit the value proposition and sales process strategies	Customer perceptions of value	Solution selling	
SALES PROCESS **TARGETING, TERRITORY AND PIPELINE MANAGEMENT** **ACCOUNT PLANNING** **SALES TOOLS AND ENABLERS**	Customer-focused and expertly executed sales processes and planning that maximize mutual value and trust	Win rates	Cross-selling	
COMPETENCY MODEL **SELECTION AND HIRING** **TRAINING** **COACHING** **PERFORMANCE REVIEWS AND ACTIONS**	Sales managers and salespeople with the knowledge, skills and attributes required to excel at their respective roles and responsibilities	Deal sizes Deal margins	New account acquisition Retention	
CULTURE **METRICS AND DASHBOARDS** **GOALS** **INCENTIVES AND REWARDS**	Highly motivated, performance-focused and accountable sales force committed to "getting it done" and "doing it right"	Cycle times	Pricing	
DATA MANAGEMENT **ANALYTICS** **LEAD GENERATION AND MANAGEMENT** **PRICING AND CONTRACTING SUPPORT** **REPORTING AND ADMINISTRATION** **PLATFORMS AND SYSTEMS**	Highly efficient support capabilities that provide the sales force with the information, expertise, speed-to-market and efficiency needed to achieve superior performance	Cost-of-sales Customer experience		

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Using the SFE Nav-Lite™ (1 of 5)

Overview:

SFE Nav-Lite™ is a simplified version of SFE Navigator™. ZS Associates is making SFE Nav-Lite™ and SFE Navigator™ openly available to all sales practitioners and academics. We are a committed partner to the sales profession and will continue to support SFE Nav-Lite™ and SFE Navigator™ on behalf of this community.

The SFE Nav-Lite™ exercise will provide you with an initial quick check of your organization's sales force effectiveness and priorities. The main steps in the exercise are the following:

Step 1: Evaluate effectiveness in each driver relative to leading practices.

Step 2: Transfer effectiveness scores to the Driver Prioritization Worksheet.

Step 3: Identify the short list of drivers for which improvement would result in a large increase in performance.

Step 4: Select priority drivers from the short list that leadership is committing to address.

Step 5: Identify other drivers that also will have to be addressed as a result of addressing the priority drivers.

Getting Started:

Determine who to involve in the exercise.

§   In general, the right group to be involved is the combination of individuals who collectively have deep insight into how the sales organization is approaching each of the drivers.

§   In some cases, evaluation teams choose to meet together and go through the entire exercise as a single group. In other cases, they choose to have sub-teams complete certain sections and then get together as a larger group to review and refine the evaluation.

§   Under any scenario, the process must be facilitated in a way that mitigates any grade inflation or deflation resulting from lack of objectivity or insufficient awareness of current practices.

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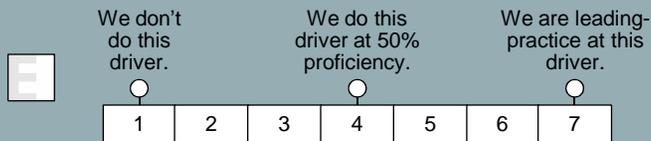
Using the SFE Nav-Lite™ (2 of 5)

SFE Nav-Lite™ Directions:

Step 1: On pages 7–9, evaluate the organization's current effectiveness relative to leading practices for each driver (e.g., market insight, segmentation, etc.).
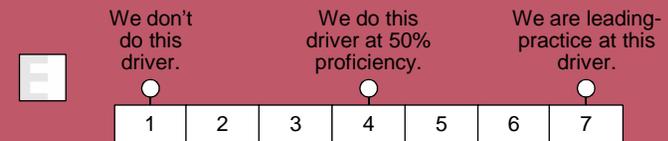
SALES STRATEGY

4 **MARKET INSIGHT:** We have deep and centralized insight on customer needs and buying processes, on competitors and on other environmental forces critical to the success of our business. The quality of our insights provides us with a significant strategic and tactical advantage.

3 **SEGMENTATION:** Our segmentation strategy is factually based on important differences in customer potential, needs and buying processes. Our segmentation includes detailed profiles for each segment, is well understood company-wide and is instrumental to our value proposition, structure and sales process strategies and execution.

2 **GROWTH PRIORITIES:** We clearly define and communicate sales force growth priorities at a granular level (e.g., by segments, market offerings, regions and growth sources—where growth sources include penetration, up-selling, solution selling, cross-selling, acquisition, retention & pricing). Our granular growth priorities strongly impact our sales strategies and tactics.

We don't do this driver.		We do this driver at 50% proficiency.			We are leading-practice at this driver.	
1	2	3	4	5	6	7

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SALES STRATEGY

MARKET INSIGHT: We have deep and centralized insight on customer needs and buying processes, on competitors and on other environmental forces critical to the success of our business. The quality of our insights provides us with a significant strategic and tactical advantage.

SEGMENTATION: Our segmentation strategy is factually based on important differences in customer potential, needs and buying processes. Our segmentation includes detailed profiles for each segment, is well understood company-wide and is instrumental to our value proposition, structure and sales process strategies and execution.

GROWTH PRIORITIES: We clearly define and communicate sales force growth priorities at a granular level (e.g., by segments, market offerings, regions and growth sources—where growth sources include penetration, up-selling, solution selling, cross-selling, acquisition, retention & pricing). Our granular growth priorities strongly impact our sales strategies and tactics.

VALUE PROPOSITION: We have detailed and summary-level, segment-specific value propositions that are aligned with customer needs, buying preferences and account potential. Our value propositions are superior to alternatives, can be effectively tailored, communicated and proven by the sales force, and result in mutual value for customers and our company.

PRICING STRATEGY: Our pricing is based on the value of our solutions relative to next best alternatives. Our pricing appropriately increases and decreases as we add or remove elements to our offerings, and achieves a profit-maximizing balance between price (margin) and win rate.

SALES & MARKETING COLLABORATION: Our sales and marketing groups collaborate effectively on market insight, segmentation, growth strategy, value proposition, pricing strategy, sales tools and lead generation and tracking. Both sales and marketing are equally committed to our go-to-market strategy and operate as customer-focused partners.

LEADERSHIP ALIGNMENT: Our leaders respect sales, lead by example and effectively participate in the sales process. Our leaders across business units, regions, segments and product groups are well aligned such that we fully capitalize on the value of our company's complete product/service portfolio and customer relationships.

We don't do this driver.		We do this driver at 50% proficiency.		We are leading-practice at this driver.		
1	2	3	4	5	6	7

SALES FORCE DESIGN

STRUCTURE: Our sales force structure aligns with how customers want to buy. We have the right level of specialization and our sales roles are clearly defined and understood across the organization. Our structure allows us to effectively and efficiently execute critical selling activities necessary to profitably sell our desired value proposition to each of our target customer segments.

ACCOUNT ASSIGNMENTS TO TEAMS: We assign accounts to teams based on a periodic, objective and fact-based process that precedes sales force sizing and allocation decisions. Assignment of accounts to key account teams includes detailed review of account potential, partnership orientation, strategic importance and our ability to serve.

SIZING & ALLOCATION: We determine sales force sizing and effort allocation based on fact-based estimates of workload and financial return on sales force effort. We have the optimal number of salespeople by team, segment, region and product/service group to maximize our profitable growth.

TERRITORY DESIGN: All of our territories have approximately one person's worth of workload considering the target accounts within each territory. Consequently, we maximize the coverage of the target account universe given our sales force capacity.
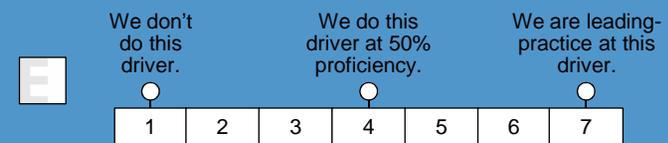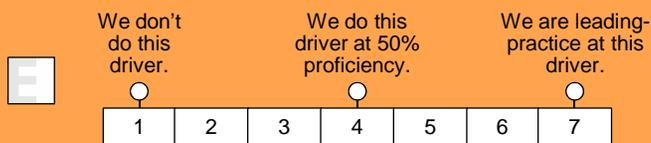
We don't do this driver.		We do this driver at 50% proficiency.		We are leading-practice at this driver.		
1	2	3	4	5	6	7

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CUSTOMER ENGAGEMENT PROCESS

SALES PROCESS: Our sales process stages, activities, roles and metrics are well-documented. Our sales process is customer-focused and results in clear identification and validation of customer needs, optimally tailored offerings, communication of compelling value propositions and proof points, mutually valuable terms and reinforcement of value actually delivered.

TARGETING, TERRITORY & PIPELINE MANAGEMENT: We provide our salespeople with quality data, analytically driven insights and the tools necessary to optimize targeting and territory management. Our salespeople consistently allocate their time to the right accounts, activities and opportunities to maximize sales success and business results in each territory.

ACCOUNT PLANNING: Our account planning process is customer-focused, starting with customer needs, objectives, buying processes and preferences, followed by our objectives and tactics. We consistently define appropriate objectives and tactics at the account level. The planning process ensures that account teams and other internal stakeholders are aligned and well coordinated.

SALES TOOLS & ENABLERS: We have defined the critical information and tools required at each stage of the sales process. Our sales force has, and effectively uses, the SFA/CRM, mobility, value-based selling tools, and other information and support required to execute our sales process and optimize their effort allocation. Our tools significantly increase the effectiveness and efficiency of our sales force and are regularly and appropriately used by all of our sales people.

PEOPLE & SKILLS

COMPETENCY MODEL: Our competency model is customized to sales, has rating dimensions that are explicitly aligned to the stages of our sales process, and provides an objective picture of proficiency at basic, advanced and expert levels. Our performance-review model, coaching tools, and training modules are mirrored to our competency model. As a result our competency model plays a powerful role in ensuring that we attract, motivate and build the right talent and skills.

SELECTION & HIRING: We fully capitalize on our internal talent pool when filling vacant roles—while at the same time demanding the right fit between requirements and capabilities. We recognize that the best salespeople are not always the best sales managers and promote accordingly. We consistently identify, recruit, evaluate and attract top-quality talent-matching desired traits per our competency model.

TRAINING: We place significant emphasis on continuous learning. Our training is organized around our sales process and provides our salespeople and sales managers with the knowledge they need to excel in their respective positions. We have mechanisms in place to ensure our sales force is committed to learning and applying what we teach them.

COACHING: We recognize what skills can be trained versus coached and apprenticed. We have a well-defined and rigorously applied coaching process explicitly tied to our competency model. Our sales managers are themselves expert in our sales process and value proposition strategy, and spend about 50% of their time developing and apprenticing their team members.

PERFORMANCE REVIEWS & ACTIONS: Our performance-review model is explicitly tied to our competency and coaching models with the addition of appropriate measures of financial performance. Performance reviews are valuable events for our sales people, not a "check the box" administrative exercise. We celebrate success and take meaningful action with low performers.

We don't do this driver.		We do this driver at 50% proficiency.		We are leading-practice at this driver.		
1	2	3	4	5	6	7

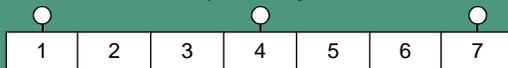| We don't do this driver.		We do this driver at 50% proficiency.		We are leading-practice at this driver.		
1	2	3	4	5	6	7

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MOTIVATION

CULTURE: We have a performance-focused, highly accountable sales culture. Our culture ensures that our salespeople consistently do the right thing in accordance with our strategy and values. Our culture differentiates us in the market place, allowing us to build stronger relationships with our customers, and enabling us to attract and retain top sales talent.

METRICS & DASHBOARDS: We have clearly defined and well-understood key performance indicators and dashboards that create a high level of transparency and allow leaders and salespeople to understand and manage performance effectively and in a timely manner.

GOALS: Our goal-setting process is based on territory opportunity, not the salesperson. Goals are fair and ensure that we pay for performance. The goal-setting process is well understood and accepted by the sales force and motivates high achievement.

INCENTIVES & REWARDS: Our incentive plan motivates the right behaviors relative to our sales strategy and contributes to attracting and retaining the right individuals. We make appropriate use of nonmonetary rewards. We focus our recognition on top performers who are both "getting it done" and "doing it right."

SALES OPERATIONS

DATA MANAGEMENT: We maintain a comprehensive, integrated and accurate database that provides a complete view of our current and prospective account profiles, sales histories and potential. Our database is a competitive advantage that strongly supports our marketing and sales strategy design, tactical planning and execution.

ANALYTICS: We apply rigorous analytics to maximize sales force effectiveness including: 1) estimating account potential, propensity to buy and messaging response, 2) establishing granular growth priorities and 3) optimizing targeting, sizing, effort allocation, territory design, pipeline and territory management, incentive compensation design and goals setting.

LEAD GENERATION & MANAGEMENT: We leverage cost-effective channels to generate leads, we employ quality analytics and tools to dynamically score and prioritize leads and we effectively manage lead tracking. Sales and marketing agree on the definition of a good lead and the sales force follows up appropriately and in a timely manner on all leads provided to them.

PRICING & CONTRACTING SUPPORT: The pricing and contracting support provided to the sales force results in rapid turnaround and in high-quality, effective and efficient pricing decisions, proposals, contracts and terms.

REPORTING & ADMINISTRATION: Our dashboards, incentive compensation administration and territory administration are governed by clearly defined, well-understood and well-executed processes that result in a high degree of accuracy, efficiency and timeliness.

PLATFORMS & SYSTEMS: The platforms and systems infrastructure employed by the organization provide the effectiveness, efficiency and flexibility needed by sales operations, marketing and the sales force to execute its activities with high quality, quickly and cost effectively.

	We don't do this driver.		We do this driver at 50% proficiency.		We are leading-practice at this driver.	
1	2	3	4	5	6	7
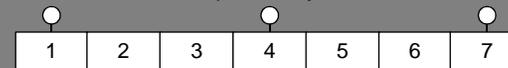
	We don't do this driver.		We do this driver at 50% proficiency.		We are leading-practice at this driver.	
1	2	3	4	5	6	7

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Step 2: On page 12, place an "X" in the "Effectiveness Scores" column of the Driver Prioritization Worksheet based on your overall scores from Step 1.

Step 3: In the "High-Impact Short List" column, select up to six drivers (20% of the 30 drivers) that if improved or transformed would result in the greatest increase in performance. To determine these drivers, keep in mind your effectiveness scores while considering the following three questions:

1. Are there any drivers that are particularly important to improve or transform in order for the organization to achieve the sales force growth priorities?

   § For instance, if the sales force growth priority is to significantly increase cross-selling across the entire portfolio within enterprise accounts in North America, drivers that commonly have to be improved or transformed to accomplish this include sales force structure, selling process and incentives. If the organization lacks sufficient effectiveness in any one of these drivers, then an "X" would be placed in the "High-Impact Short List" column accordingly.

2. Are there any drivers that are particularly important to improve or transform in order for the organization to resolve pain points that are significantly limiting the sales force's performance (e.g., high turnover, role confusion, too little selling time, low win rates, high sales support costs and many others)?

3. Are there any drivers that are particularly important to improve or transform in order for the organization to resolve competitive disadvantages that are significantly limiting the sales force's performance?

Note that Step 3 is not always easy. The relationship between drivers and growth priorities, pain points and competitive disadvantages vary from one situation to the next and can be complex. Don't get derailed. Keep in mind that the main goal to accomplish in this step is to capture your team's beliefs about those six drivers that, if improved, would lead to the greatest performance impact.

2								**3**

Driver Prioritization Worksheet	Effectiveness Scores (X)							High-Impact Short List (X) — Select up to six drivers (20%) that if improved or transformed would result in the greatest increase in performance considering growth priorities, pain points & competitive gaps.
	1	2	3	4	5	6	7	
MARKET INSIGHT				X				
SEGMENTATION		X						X
GROWTH PRIORITIES				X				
VALUE PROPOSITION		X						X
PRICING STRATEGY			X					
SALES AND MARKETING COLLABORATION			X					
LEADERSHIP ALIGNMENT				X				
STRUCTURE	X							X
ACCOUNT ASSIGNMENTS TO TEAMS			X					
SIZING AND ALLOCATION		X						
TERRITORY DESIGN	X							
SALES PROCESS			X					
TARGETING, TERRITORY AND PIPELINE MANAGEMENT					X			
ACCOUNT PLANNING					X			
SALES TOOLS AND ENABLERS			X					
COMPETENCY MODEL			X					
SELECTION AND HIRING						X		
TRAINING			X					X
COACHING			X					
PERFORMANCE REVIEWS AND ACTIONS			X					
CULTURE				X				
METRICS AND DASHBOARDS			X					
GOALS			X					
INCENTIVES AND REWARDS			X					
DATA MANAGEMENT			X					
ANALYTICS			X					
LEAD GENERATION AND MANAGEMENT					X			
PRICING AND CONTRACTING SUPPORT		X						
REPORTING AND ADMINISTRATION			X					
PLATFORMS AND SYSTEMS			X					

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Using the SFE Nav-Lite™

Step 4: Considering all factors, identify up to three SFE priorities that management is committing to act upon by placing an "A," "B" and "C" in the "Driver Priorities (A, B, C)" column..

§ Priorities are those high-impact drivers from Step 3 that leadership is electing to address.

§ At this stage, in addition to impact, also consider time-to-impact, risks & mitigation, degree of difficulty, budget constraints and leadership bandwidth constraints.

§ Use CAPITAL letters only as lowercase letters will be used in Step 5

Step 5: In the "Interdependencies (a, b, c)" column, identify drivers that will have to be addressed as a result of addressing a priority driver (Step 4).

§ Use lowercase letters that correspond to the letter in the "Driver Priorities" column. For instance, if Structure is identified as the "A" priority, then other downstream drivers like Sizing and Allocation, Territory Design, Competency Model, and Incentives and Rewards could receive an "a" designation in the "Interdependencies" column to indicate that they will have to be changed as a consequence of changing Structure.

§ Some drivers may receive multiple lowercase scores, meaning that they are interdependent with more than one of the priority drivers.

Driver Prioritization Worksheet	Effectiveness Scores (X)							High-Impact Short List (X) — Select up to six drivers (20%) that if improved or transformed would result in the greatest increase in performance considering growth priorities, pain points & competitive gaps.	Driver Priorities (A, B, C) — From the High-Impact Short List, select up to three drivers to address also considering time-to-impact, risk, difficulty, budget & bandwidth.	Interdependencies (a, b, c) — Specify the drivers that also have to be addressed as a consequence of addressing each of the priority drivers.
	1	2	3	4	5	6	7	**3**	**4**	**5**
MARKET INSIGHT			X							
SEGMENTATION		X						X		a
GROWTH PRIORITIES			X							
VALUE PROPOSITION		X						X	B	
PRICING STRATEGY			X							
SALES AND MARKETING COLLABORATION			X							
LEADERSHIP ALIGNMENT				X						
STRUCTURE	X							X	A	
ACCOUNT ASSIGNMENTS TO TEAMS		X								a
SIZING AND ALLOCATION		X								a
TERRITORY DESIGN	X									a
SALES PROCESS			X							
TARGETING, TERRITORY AND PIPELINE MANAGEMENT					X					
ACCOUNT PLANNING					X					
SALES TOOLS AND ENABLERS			X							b
COMPETENCY MODEL			X							
SELECTION AND HIRING						X				
TRAINING			X					X		b
COACHING			X							
PERFORMANCE REVIEWS AND ACTIONS			X							
CULTURE					X					
METRICS AND DASHBOARDS			X							
GOALS			X							
INCENTIVES AND REWARDS			X							a, b
DATA MANAGEMENT			X							
ANALYTICS			X							
LEAD GENERATION AND MANAGEMENT					X					
PRICING AND CONTRACTING SUPPORT		X								
REPORTING AND ADMINISTRATION			X							
PLATFORMS AND SYSTEMS			X							

SFE Nav-Lite™

Driver Prioritization Worksheet	Effectiveness Scores (X)							High-Impact Short List (X)	Driver Priorities (A, B, C)	Interdependencies (a, b, c)
	1	2	3	4	5	6	7	Select up to six drivers (20%) that if improved or transformed would result in the greatest increase in performance considering growth priorities, pain points & competitive gaps.	From the High-Impact Short List, select up to three drivers to address also considering time-to-impact, risk, difficulty, budget & bandwidth.	Specify the drivers that also have to be addressed as a consequence of addressing each of the priority drivers.
MARKET INSIGHT										
SEGMENTATION										
GROWTH PRIORITIES										
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REPORTING AND ADMINISTRATION										
PLATFORMS AND SYSTEMS										

Using the SFE Nav-Lite™ (5 of 5)

Step 6 (optional): **Transfer your Effectiveness, Priority and Interdependency scores to the SFE Nav-Lite™ Dashboard on page 14.**

If a driver has more than one Interdependency score, simply list one to indicate that the driver will be addressed.

Some teams find it useful to use the SFE Nav-Lite™ Dashboard as a quick reference for ongoing assessment and tracking of their organization's sales force effectiveness initiatives.
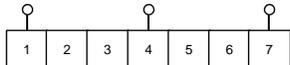
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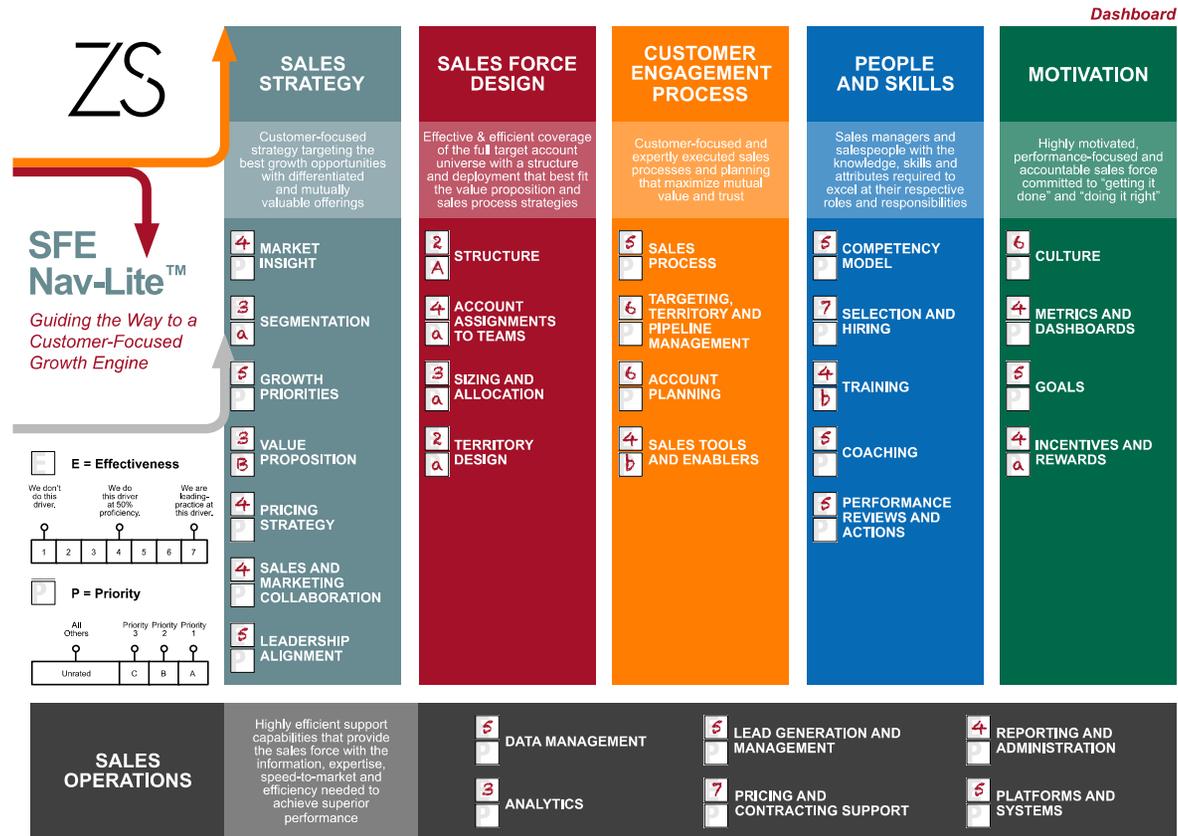
Guiding the Way to a Customer-Focused Growth Engine

E = Effectiveness

We don't do this driver.		We do this driver at 50% proficiency.		We are leading-practice at this driver.
1	2	3	4	5	6	7

P = Priority

All Others	Priority 3	Priority 2	Priority 1
Unrated	C	B	A

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Customer-focused strategy targeting the best growth opportunities with differentiated and mutually valuable offerings

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- **LEADERSHIP ALIGNMENT**

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Effective & efficient coverage of the full target account universe with a structure and deployment that best fit the value proposition and sales process strategies

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- **TERRITORY DESIGN**

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Additional Support and Resources

SFE Navigator™ and SFE Nav-Lite™ are tools of general applicability and may not entirely address your particular situation.

Additional support and resources are available to help you implement SFE Navigator™ or SFE Nav-Lite™ at your organization.

Online at ZSAssociates.com/SFENavigator

§ Online version of SFE Navigator™ and SFE Nav-Lite™.

§ Frequently asked questions and responses.

§ "Building a Customer Focused Growth Engine: Establishing Sales Force Effectiveness Priorities," by Moorman, Solem, Bernewitz, Curry (also provided in this publication).

Expert Assistance

ZS provides a range of consulting services related to SFE Navigator™ and SFE Nav-Lite™:

§ Customized SFE workshops that include training on SFE leading practices and that can be coupled with facilitated sessions focused on SFE evaluation and priority setting.

§ Quantitative assessments of SFE drivers using leading techniques to validate current effectiveness and to quantify the impact of effectiveness improvements.

§ SFE deep-dive audits across the full spectrum of drivers or for a specific subset of drivers.

In addition, ZS provides expert consulting, capabilities building and outsourcing support across the full spectrum of SFE drivers. We welcome the opportunity to speak with you to understand your situation and to connect you with the appropriate senior members of our team who bring deep expertise in the specific SFE issues you are considering. Companies desiring expert support for their SFE initiatives can contact ZS at SFENavigatorInquiry@zsassociates.com or 855-972-4769.

Finally, ZS has published many books and white papers discussing best practices on various sales force effectiveness topics. Please see zsassociates.com/publications.aspx for information on how to obtain copies of these materials.

We hope that you find SFE Navigator™, SFE Nav-Lite™ and the ZS resources supporting them to be helpful in your efforts to improve sales force effectiveness at your organization. Please give us your feedback at zsassociates.com/SFENavigatorFeedback so we can continue to improve these tools to meet your needs.