Reflections on Leadership: Process, Planning and Execution

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Over the years, I have worked within different sales teams, under different leaders and across businesses with very different approaches to how sales should be managed. Some have been highly structured, others less so, and like most people who have spent a long time in sales environments, I have experienced opportunities that went exactly as planned alongside others that slipped, changed or disappeared altogether.

Those experiences have shaped how I think about the operational side of leadership and the environment a sales team needs if it is going to perform consistently.

People will always sell differently. Personality, experience, relationships and individual judgement are part of what makes someone successful. There are, however, areas where I believe consistency is important because the information created by a sales team extends well beyond the individual salesperson, influencing how the wider business plans, invests and makes decisions. If those decisions are going to be based on information provided by sales, we need to understand how reliable that information is and what sits behind it.

That starts with having a strong CRM and using it properly.

Whether that is Dynamics, Salesforce or another platform, I believe CRM should provide the single source of truth for the sales team and the wider business. That only works if the information within it reflects what is actually happening, which means opportunities need to be reviewed and updated regularly as conversations develop, relationships change and new information becomes available.

Team calls and one-to-one conversations are an important part of that process because they provide an opportunity to understand what sits behind the information. If an opportunity is being committed, there should be understanding as to why. If the close date has moved, we should understand what changed. If there is risk, we should know where it sits and what can be done to mitigate it.

There also needs to be honesty around the conversations we are having with customers and, just as importantly, the conversations we are not having.

Understanding what we still need to learn about an opportunity, and why we have not been able to establish it, gives us the opportunity to address those gaps while we can still influence the outcome. A positive forecast should reflect the strength of what we know rather than hide what we do not.

I do not see that as a negative way to manage sales. I see it as understanding the opportunity properly.

Planning and qualification

Strong account and opportunity planning is important because it gives us a structured view of the customer, the opportunities we are developing and what needs to happen to move them forward. Within opportunity planning, MEDDIC is my personal preference and methodology because it provides a consistent way of qualifying what sits behind an opportunity and understanding the strength of the business case.

Metrics, the Economic Buyer, Decision Criteria and Decision Process, Identifying Pain and developing a Champion give us a framework for understanding the opportunity as it develops, while exposing where information, relationships or conversations are still missing. That intelligence then becomes part of the wider account plan, helping us understand not only the individual opportunity, but how it fits within the customer relationship and where we need to develop that relationship over time.

The methodology provides structure, but the value comes from the conversations and thinking it encourages.

Imagine committing an opportunity to the business and then watching that deal slip or collapse. There may be a completely legitimate reason for that. The question is whether that was genuinely the case, or whether there were things we could have understood earlier through better qualification, planning and conversation.

Perhaps we had not reached the right people. We may have assumed the customer understood the value without establishing it properly, or believed a decision was going to be made without understanding the process through which that decision had to travel. A competitor may have been stronger than we realised, or a relationship we believed was supporting us may not have carried the influence we thought it did. The purpose of good planning is to understand as much of that as possible before the outcome tells us what we missed.

If an opportunity is important enough to commit to the business, the conversations, intelligence, risks and actions behind that commitment should be understood. Applying the same principles across opportunities and accounts gives the team a common way of looking at those decisions without removing the experience and judgement of the individual salesperson.

SWOT analysis can support that process because it provides a balanced snapshot of where we stand. Understanding strengths and opportunities gives us something to build from, while weaknesses and threats identify where we may be exposed or where more work is required.

I have always liked the balance within that approach because a useful account or opportunity plan should reflect the positive and negative factors influencing it. If we understand both, we have a better platform from which to make decisions and build the intelligence needed to move forward. That intelligence becomes increasingly valuable as the relationship develops.

The objective should not always be the next transaction. The more we understand a customer's business, its challenges, priorities and longer-term direction, the better positioned we are to add value beyond an individual opportunity. Over time, that can change the relationship from customer and supplier towards something closer to a partnership, while our own position can move from supplier towards trusted advisor.

That position has to be earned through the quality of the relationship, the conversations we have and the value we consistently bring to them.

Leadership and the forecast

The same level of honesty required from a sales team also needs to exist within leadership. Forecasting is a shared process, where salespeople need to maintain accurate opportunities, understand the risks and make considered commitments, while leadership needs to apply the same scrutiny to the information and commitments being presented.

When a forecast is accepted, leadership also takes responsibility for the judgement behind it and the commitment subsequently made to the wider business. Understanding the strength of that forecast, including where risk remains and how it can be mitigated, should therefore be part of the conversation before the number is accepted.

Regular reviews become valuable when they create space for an honest conversation around the account or opportunity. One-to-ones allow the salesperson and leader to work through the position together, while team calls bring wider experience into the discussion and can offer a different perspective from someone working closely on the opportunity. The objective is to improve the quality of the decision, not to create a process where people learn to defend a forecast.

There is also a wider balance that leadership needs to maintain.

Sales teams have targets to deliver and businesses need predictable revenue, so there will always be an immediate requirement to understand what can close this month, this quarter or this year. Alongside that, leadership needs to understand how the work taking place across accounts is developing the relationships, positioning and opportunities that will support future growth. The two are connected, with the decisions and actions taken today influencing the position the business creates for the future.

That is also where differentiation develops. Understanding a customer properly allows us to position our value around what they are trying to achieve rather than only around what we want to sell. The stronger that understanding becomes, the greater the opportunity to build relationships that extend beyond an individual product, contract or sales cycle.

CRM, forecasting, MEDDIC, SWOT and account planning all contribute to that understanding, but none of them creates it alone. Their value comes from how they are used together and whether the people using them are prepared to be honest about what they know, what they do not know and what still needs to happen.

For me, that is the purpose of process, planning and execution within sales leadership. It creates consistency around how opportunities and accounts are understood, giving the wider business greater confidence in the information it uses while allowing individual salespeople to apply their own experience and judgement.

The process, however, should never become more important than the people using it. How leaders engage with those people, build relationships and create an environment where honesty can exist takes this into another side of leadership that I believe is equally important.

The human side.