

Starting Smart Into Outside Sales



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*Dave Fellman's Guide To The Key Issues
In Hiring, Training, Managing And Motivating
Quick/Digital/Small Commercial
Printing Salespeople*

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Key Issues In Hiring, Training, Managing And Motivating Quick/Digital/Small Commercial Printing Salespeople

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If selling in general is a mystery to many quick/digital/small commercial printers, then hiring and managing salespeople must seem to be up there with the greatest mysteries of all time. You only need to look at the failure rate to know that something is really wrong in the way outside salespeople are hired, trained, and managed in this industry.

Nobody should expect a 100% success rate with salespeople, or any other category of employee for that matter. But when you talk to sales managers in other industries, they talk about an expectation that one or two out of every ten salespeople they hire will fail. An informal survey I've done seems to indicate that *more than half* of the salespeople hired by quick/digital/small commercial printers during the last several years didn't make it to the end of one full year. Many of those salespeople quit or were fired within the first six months.

That's a horrifying statistic. It's so horrifying that it might lead you to the conclusion that quick/digital/small commercial printers shouldn't have salespeople, that there's something about this industry that makes it especially difficult for a salesperson to succeed. But there isn't anything like that. In truth, there are only a few reasons why salespeople fail in any industry. Lack of training is one. Lack of motivation and proper management is another (especially during the critical first few months of employment!) But hiring the wrong person in the first place may be the leading cause of all.

MORE MISTAKES

I don't think the printing industry offers any more intrinsic potential for salespeople to fail than any other industry, but I do think that quick/digital/small commercial printers make more hiring, training, and management mistakes than most other sales managers. And the reason for that is pretty simple—and not necessarily a reason for blame! It's the simple truth that most quick/digital/small commercial printers have no sales management experience. They are operating by trial and error, and making lots of similar and typical mistakes.

Most of these mistakes are avoidable. Like so many

other things, it's just a matter of understanding and applying a few basic skills...and using all of the available resources! I think the important thing is for you not to back off from the idea of putting salespeople to work for you. Sure, there are risks involved, but there are substantial benefits as well. If you can make a salesperson successful, he or she is going to make you more successful...maybe *much more* successful!

So, let's take it by the numbers and examine the issues that will help you to make outside sales work for your company.

1. DEFINING THE JOB AND DEVELOPING A PROFILE

Hiring the wrong person in the first place may very well be the leading cause of sales failure. But what are we talking about here? Are there certain types of people who can't sell? I don't think so, as long as they possess a certain level of intelligence and the willingness to work. I'm absolutely committed to the belief that selling is an acquired talent. It's something you learn—something that can be taught—not something a person has to be born with.

But the *ability* to sell is very rarely the issue behind a person being wrong for a particular selling job. Much more often, the issue is a poor match between the salesperson and the product, the market, the income level, or the expectations of the person doing the hiring and ultimately managing the salesperson.

Job Description. Let's start with the understanding that there are many different types of salespeople and selling situations. Before you even think about looking for a salesperson, you must define the job you want that person to do. Are you looking for someone who will bring in new customers, or "service" those you already have? Do you expect your salesperson to do his/her own estimating? Take customers/prospects out to lunch? Make deliveries? The specifics of the job have a definite bearing on the sort of person who will be right for the job! (You'll find an example of a printing salesperson's job description in the Appendix section.)

The Money Factor. Next you must consider “the money factor,” since it’s almost certain to be the sales candidate’s first concern. (If it’s not, by the way, don’t waste any more time talking with that candidate. You want people who want to make money. You don’t want people as salespeople who tell you that the money isn’t important. They’re either lying to you, or else they’re people who will be difficult for you to motivate. Either way, that’s a hiring mistake looking for a place to happen.)

There are three issues to be addressed in determining an income level match. The first is your *investment tolerance*—how much money you’re willing to invest over a specific period of time. The second is how much the candidate wants to make. And the third is how much the candidate *needs* to make while starting out.

Your decision on the amount you’re willing to invest has to come first, because it will determine the level of maturity and experience you can hire. Let’s say you’re willing to invest—or can afford to invest—\$1500.00 per month in a salesperson. I want you to understand that you’ll only get a good match with someone *to whom that’s enough money*. Your best match in the \$1500.00 per month range will probably be a young person looking for an entry-level sales job.

I’d better note that we’re only talking about guaranteed compensation here. I believe very strongly that the total compensation plan should have a guaranteed component, made up of a salary or draw against commissions, and an earned component based on commissions alone. We’ll discuss compensation plans in greater detail a little farther along, but this is where the issue of what the candidate wants and especially *needs* to earn comes in. Your \$1500.00 per month investment in guaranteed compensation might reasonably be expected to turn into the \$25,000 per year job that the salesperson *wants* if he or she brings in enough commissionable sales volume to justify that total compensation. In the short term, though, while the salesperson is laying the groundwork for future success, there has to be enough money coming in to keep the salesperson going. Otherwise, the relationship is guaranteed to fail.

As noted, we’ll discuss compensation plans in greater detail farther along. It’s important, though, that you have the basic structure of your compensation plan in place before you start the hiring process. One of the most common hiring errors quick/digital/small commercial printers make is advertise for a salesperson and then negotiate a compensation plan based on what the candidate wants, essentially allowing the candidate to define the compensation plan. That’s just plain crazy, folks! It is up to you to decide how much you are willing—or able—to invest, and to develop an overall

compensation plan that will both motivate a salesperson and ensure your profitability. The challenge, then, is to find the best candidate who fits within your initial investment and overall compensation tolerances.

Cost vs. Experience. It’s generally true that as you move up in the investment range, you can expect to attract candidates with more experience, either actual sales experience or at least a greater level of maturity. If you’re willing to invest \$2500-\$3500 per month right from the start, you can probably hire someone with printing sales experience, and maybe even an established account base. I would caution you, though, against counting on all of that business coming along with the salesperson. That doesn’t always happen, as many printers have learned the hard way.

There’s no definitive answer on whether it’s better to hire young and cheap, or experienced and relatively expensive...you can be successful either way. The younger, less experienced person will almost certainly take longer to produce, but you’re investing less, thereby keeping the relationship between money going out and sales volume coming in balanced. The more experienced person stands to produce more quickly, but you do have more money at risk.

Products and Market. I tend to lean toward younger, inexperienced people as a quick/digital/small commercial printer’s best choice. Lower cost and investment is part of my rationale. But of equal importance is the idea that an inexperienced person is less likely to have the kind of ingrained attitudes and “bad habits” that would make it difficult to get a match with the kinds of products and customers that make up this segment of the overall printing market.

Quick/digital/small commercial printers sell small but important print jobs. They’re often small in terms of dollar value, but they are very important to the customer. Unfortunately, the sales world is full of “big ticket” mentalities, who simply could never make the adjustment from chasing large orders in the hope of bagging one every once in a while to producing a steady flow of small but important print jobs.

Your hiring process needs to screen out these “big ticket” thinkers, and also screen out anyone who might not relate well to the sort of people who make up your customer base. I would stay away from people whose sales experience came in any kind of “pressure” selling, like the yellow pages or automobiles. Printing is sold most effectively when trust and confidence are developed, not by pressure tactics.

Profiling. One of the best steps you can take to avoid a hiring mistake is to develop a written profile of the

person you think will be best suited to the job. It is admittedly unlikely that you'll find a person who's a perfect match, but this written profile will help you greatly in evaluating candidates. It will also help you to understand your upcoming training challenge. Please consider that a printing salesperson must know certain things in order to be successful (we'll talk about those things a little farther along.) The unavoidable truth is that any necessary knowledge that is not present in your candidate will have to be trained in! It's important to consider that at the very earliest stages of the hiring process.

As a means to help you evaluate candidates, it's also a good idea to assign a "point value" to each factor on your profile. We'll talk more about that in an upcoming section on evaluating resumes.

You'll find a "questionnaire" to help you develop your profile in the Appendix section, along with an example of one company's actual profile developed from this questionnaire.

Key Characteristics. Here's a list of what I think are the most important characteristics to look for in a quick/digital/small commercial printing sales candidate:

- brightness/intelligence
- stable work history (ideally, no less than 2 years at any previous job)
 - previous "business-to-business" sales or customer service experience
 - outgoing personality coupled with a competitive nature
 - demonstrated attention to detail
 - computer skills
 - printing/graphic arts experience and product knowledge not necessary...but a real plus!

Let me also mention here that I would require that any candidate provide me with a comprehensive resume, listing each previous employer—starting with the most recent and working backwards—and listing job title and responsibilities for each position held.

2. INITIATING A COMPREHENSIVE SEARCH

Where and how do you look for a winning salesperson? The answer to that question is that there really is no simple answer. Some quick/digital/small commercial printers have found great people through "help wanted" ads in the newspaper, and others have run ads for weeks and not even gotten a single response. Some have used "networking" techniques, and still others have used search firms—"headhunters"—to help them find salespeople.

The best strategy for finding a winning salesperson is a multi-faceted, comprehensive approach...and it starts with a look *inside* your company.

I mentioned just a moment ago that a printing salesperson must know certain things in order to be successful. In my opinion, there are four main components to the *Printing Sales Knowledge Base*.

Product Knowledge. The first of these components is *product knowledge*. A quick/digital/small commercial printing salesperson's product knowledge requirement is substantial, much more substantial, in fact, than salespeople in many other industries face. A printing salesperson has to have some knowledge of how the ink—or toner—gets on the paper; of what has to happen before printing or imaging can occur; of the bindery processes that are typically required to complete a job after the paper is printed or imaged; and of the capabilities and limitations of the equipment that *your* shop uses to do all of this.

Beyond just the equipment and technology, a quick/digital/small commercial salesperson should be familiar with paper, and also with the specifics of a wide range of "printed products," like brochures and business cards, business forms, booklets and catalogs, mailers and manuals.

And even that doesn't fully cover it. The best quick/digital/small commercial salespeople are also capable of addressing the *purpose* of the printed piece, and helping clients to create printing that will actually perform to it's purpose better. Graphics and design skills, copywriting skills, and basic marketing expertise fall into the *product knowledge* category in the Printing Sales Knowledge Base.

Market Knowledge. The second component is *market knowledge*, which refers to the things a quick/digital/small commercial salesperson should know about market itself; about "typical" customers—and your specific customers—and about trends in the printing marketplace.

The increased use of color in business printing is an example of what I mean by trends in the marketplace. Other examples are the trend toward "digital originals," and the trend toward buying smaller quantities more frequently, as opposed to the old approach of buying enough "to last all year."

Operational Knowledge. The third component is *operational knowledge*, which simply refers to the way you want your shop to run. How is an order entered? What is a "normal" delivery? Who does the pricing, and how much latitude, if any, does the salesperson have in adjusting those prices?

How do you want your salesperson to dress when out on sales calls? What are the parameters—if you even want this happening—for taking prospects or custom-

ers out to lunch. Who's responsible for picking up artwork, or getting proofs back into the shop, or making rush deliveries?

In my experience, this sort of *operational knowledge* is the component that gets the least attention in training salespeople. The result is most often that the salesperson is never fully integrated into the organization, never made part of the team. What you get then is usually friction between the salesperson and everyone else, including the owner, which all too often leads to "you're fired!" Or "I quit!"

Selling Technique. The fourth and final component of the Printing Sales Knowledge Base is *selling technique*...how to prospect, qualify, and then convince the right kind of people to become your customers. This is probably the component that's given the most importance in most quick/digital/small commercial printing companies' thoughts on training. I hope you'll see that it's only a part of the overall training challenge.

Intelligence Factors. Another thing I hope you'll see is that three of these components are very definitely *intelligence factors* rather than *personality factors*. The three I'm specifically talking about are product knowledge, market knowledge, and operational knowledge—but I think you can also make a strong case for selling technique being as much an intelligence factor as any factor of personality. As I said earlier, I believe that salespeople are made—trained—and not born. I want you to look for bright people to hire as salespeople, and I've always considered a "sales personality" as a plus, but never as a requirement.

The final thing I hope you'll see and really take to heart is that all of the people you have working for you now—counter help, office help, even press or copier operators and bindery people—have at least some measure of product knowledge, market knowledge, and operational knowledge in their own current knowledge base. It may be that all they need to become effective salespeople is some training in selling technique.

Look Inside. The point is this...the best salesperson you could possibly hope to hire may be someone you've hired already! There's no question in my mind that the first place you should look for an outside salesperson is on your own current staff. And I definitely include production people in that statement. Some of the most successful printing salespeople I know came out of the production environment. As Bob Hall (Executive Editor of *Quick Printing*) might say, they "cleaned up real nice," and then made very good use of their extensive product and operational knowledge, improving their market knowledge and selling technique along the way.

It's worth noting that I've seen production people turned into effective salespeople by design...and by desperation! More than a few successful salespeople I know were given the option to either try selling or find a completely new job. And when you think about it, that's not a bad choice in that situation for either party. Most quick/digital/small commercial printshop owners don't seem to want to let people go, even when there's simply not enough work to keep them around. Turning an underutilized inside employee into an outside salesperson—even on a part-time basis—gives that person much more of an opportunity to be productive, and a real chance to make a positive contribution to the health of the business.

Not everyone *wants* to be a salesperson, though. That's a fact, and you may still have to look outside. But don't discount the potential in your inside employees. Be aware—and make them aware in your discussions—that they have a healthy head start on the Printing Sales Knowledge Base.

Looking Outside. As noted earlier, the best strategy for finding a winning salesperson is a multi-faceted, comprehensive approach, and the most obvious starting point is an ad in the most widely-read local newspaper. What should the ad say? In answering that question, let's consider exactly what you want the ad to accomplish. I think you want it to *attract* any candidate who fits your profile, and *repel* any candidate who doesn't.

In order to be successful at meeting this challenge, a "help wanted" ad must provide the reader with three key pieces of information: (1) a brief description of the company and the job; (2) a specific understanding of the job's compensation range; and (3) instructions on how to respond.

In all cases, specific is better than vague. Please understand that you don't measure the success of a "help wanted" ad in terms of *quantity* of response, but rather by the *quality* of response. In other words, you're better off with a small number of solid candidates than with a larger number of bad ones.

You'll be wise to plan on running your ad for at least two weeks. The Sunday newspaper is generally acknowledged as the most likely place for job seekers to be looking, and if cost is a factor, you'll get the best bang for your buck in the Sunday edition.

You'll find several examples of "help wanted" ads in the Appendix section.

Networking Options. Running an ad in the newspaper may be the most obvious starting point in the search for a salesperson, but it's probably not the best option available to you. That option is to "network" your

search; to reach out to friends and acquaintances, suppliers and even customers as a means to identify solid candidates.

Think of it this way, who are the people looking in the “Help Wanted” section of your newspaper? For the most part, they are people with an active interest in changing jobs. Why would that be? There are really only two possibilities...either something is (or was) wrong with the job they have (or had), or something is wrong with the person. Granted, there are plenty of good people working in bad situations where you wouldn't hold a desire to change against them, but the truth of the matter is that the ideal candidate for your sales position is probably working at a job right now and happy at it...but smart enough to listen if something better comes along!

The secret to effective networking is to be able to tell your friend or acquaintance, supplier or customer exactly what sort of person you're looking for. And that takes us back to...the written profile! One of my clients recently took copies of his written profile to a Chamber of Commerce meeting, and told his fellow local business people that he was looking for a salesperson. “This is the profile we've put together,” he told them. “If you know someone who fits the profile—and who might be interested in what I think is a great opportunity—please do one of two things: either give the person my name, and ask him or her to call me, or give me the person's name and I'll make the call.” My client gained referrals to two very solid candidates through this strategy, and ended up hiring them both!

By the way, please note my use of the word “referral.” In selling, a referral gives a salesperson an important head start at building a relationship, because even though the prospect may not know the salesperson very well, that salesperson was referred by someone the prospect knows at least a little bit better. In hiring, a referral gives you another important resource...someone who may very well have had some personal experience with the person you're considering.

Headhunters. Many quick/digital/small commercial printers have been reluctant to use “headhunters”—search firms, executive recruiters, employment agencies, etc—because of the costs involved. A typical search firm will ask you for a fee in the neighborhood of 30%—and that's 30% of total expected first-year earnings, not just guaranteed earnings. Don't ever forget, though, that just about everything in this world is negotiable!

Another one of my clients went to a search firm with her profile and made a counter-offer to the 30% fee (which in this case represented approximately \$8000.) “I'll pay you \$1000 if I hire a candidate you send me,”

she said, “and then I'll pay you \$2000 more if I keep the person beyond 90 days. And then I'll pay you \$3000 more if he/she reaches my first year sales objective (which in this case was \$250,000.) The recruiter apparently decided that a shot at \$6000 was better than nothing, because he agreed to those terms. (Interestingly, my client found her own salesperson through a networking process similar to that described earlier. But the lesson here is that the headhunter was willing to deal.)

Why even consider a headhunter, you might ask? I think the main reason is that a recruiter does exactly that; he/she calls people who already have jobs to see if they might be interested in looking at “something better.” A recruiter can be especially helpful if you're considering trying to hire an experienced salesperson away from one of your competitors.

Bottom Line. The bottom line in this section is that no single activity will guarantee that you'll find solid candidates. The best approach is a proactive and comprehensive approach...to put lots of irons in the fire and leave no stone unturned in your search for a high-performance salesperson.

But here's one more important “word of wisdom”—patience! Don't ever lose track of the fact that a salesperson is a major investment—and like all investments, the potential is there to lose your money if you invest poorly. You should plan for it to take two full months to identify candidates, evaluate and interview, make a decision and an offer, and have a new salesperson actually at work in your company.

3. EVALUATING RESUMES

Please remember that one of the keys to a successful “help wanted” ad—or any other method of marketing a sales position—is to provide instructions on how to respond. My personal preference has always been to ask for a resume and cover letter, sent through the mail, by fax, or in recent times, even by e-mail. There's no question in my mind that you want to see a resume—and no question that an applicant for a sales position should have a professional-looking resume!

Here's a piece of advice I give to all of my clients...once you've placed your ad(s) and started your networking process, resist the temptation to look at every resume as it comes in! I think it's a far better idea to establish a “collection period”—perhaps two weeks—and simply place every response you get in a file folder until that collection period is over. I've found that this strategy provides two benefits: (1) it provides some insulation against the “highs and lows” that many printers seem to go through at this stage of the process (highs any time a solid-looking resume comes in, and

lows on the days when no responses arrive) and (2), it's simply easier to evaluate the resumes objectively when you look at them all at the same time.

The most important consideration here is that you do not compare the resumes directly to each other. You compare them to your written profile! Remember, you took the time to think about the characteristics you are looking for in a salesperson. Now let's see how well your respondents match your profile.

I mentioned earlier that it's a good idea to assign a "point value" to each factor on your profile. As you look at the example in the Appendix section, you'll see how these point values were assigned. In this particular profile, the most important factor concerns age, sex and earnings requirement. This factor was assigned a value of 40 points. (*"The ideal candidate is probably a woman between the ages of 28-55 with modest initial compensation requirements...\$1800 - 2200 per month 'need' for the first 4-6 months; \$24,000 - \$28,000 'want' for the first full year."*)

In evaluating resumes against these criteria, a 30-something woman with exactly those compensation requirements would score all 40 points; a 30-something man with the same compensation requirements might score 35 points; a man who graduated from college in 1965 and whose resume indicates jobs at a much higher pay scale might score 0 points.

(By the way, I know that this could be construed as discriminatory, and we both know that discrimination is illegal. If you are uncomfortable in any way with possible discriminatory liability, you should talk with your lawyer before you put your profile in writing. I am committed, though, to the idea that you are allowed to hire the best person for any job, and that involves consideration of a variety of "success factors." I hope your lawyer will tell you that you won't be punished for making good business decisions.)

As you look at the sample profile in the Appendix section, you will note that there are several factors which you can't really evaluate from a resume alone. My feeling, though, is that 80 of the 100 points *can be* evaluated (those factors are indicated by a check mark on the example.) From that point, my feeling is that anyone who scores 40 points or more in your evaluation of their resume is worth interviewing. Anyone who scores less than 40 points should be removed from consideration.

What about situations where you're not quite sure how to score a candidate based on what you see on the resume? It's an unfortunate fact that many resumes tell you less than you really need to know.

In those situations, I recommend a telephone "pre-interview." "I have your resume here," you might say, "and I like what I see so far, but there are a couple of

things I need to ask you about before we schedule a formal interview." Then ask whatever questions will help you to get an accurate picture of how this person scores against your profile. (Please note that I'm not suggesting that you conduct a comprehensive interview over the phone, just enough to answer your immediate questions.)

What if you don't get anyone who scores 40 points or better? My advice would be to run your ad(s) again, and check back with all of the people you originally shared your plans and your profile with. Remember, anything necessary for success which is not present in a candidate will have to be trained in. It's a huge mistake to take on too large a training challenge. As the old saying goes, you can't make a silk purse out of a sow's ear. Be patient, and keep looking until you find the *right* person!

Need To Hire? Here's a question to consider. Would you ever *need* to hire a salesperson immediately? There are really only two possible situations that would cause you to *want* to hire one: first, to grow your business beyond where it is now, and second, to take care of customers you already have (perhaps replacing a salesperson who had established some accounts.) If the desire is to grow your business, you'd better face the reality that no matter what you do, it's going to take time for a salesperson to develop relationships and start bringing in business. The idea that you can hire a salesperson and start seeing significant results immediately is simply not realistic. Remember, the purpose of increasing sales volume is really to increase profits. Experience has shown that the strategy of hiring a "warm body" typically results in a loss of profit.

As for taking care of a departed salesperson's established customers, don't forget that you have the option of turning them into "house accounts"—either temporarily or permanently. And don't forget that another option is to let them go uncared-for. Again, the focus should be profit, not just sales volume. Remember, you can afford to lose some business when you have already reduced your payroll expense by whatever you were paying the departed salesperson. Measure that against the possibility that you will go "out of the frying pan and into the fire" by moving too quickly and making a hiring mistake on a replacement.

One of the foundations of sales management success is to hire the right person, not the first person!

4. THE INTERVIEWS STAGE

I think one of the key secrets of my own sales management success has been that I always made certain that the people I hired were a good match with me. If you'll accept that there are plenty of people in

this world with the talent—or at least the capability—to sell effectively, I hope you’ll also see the wisdom in waiting until you find one who will also work well with you and for you.

The way I’ve looked at it, if a person will work for me, I can teach and manage that person. If he or she won’t work for me, I’d just be asking for trouble to bring that person on board.

Because I’m looking so carefully for someone who will match up well with me and work *for me*, I’ve surprised a lot of people who’ve come to me on interviews. I think it’s fair to say that most job-seekers expect to have to do most of the talking on an interview, going through their background and work history, and answering questions from the interviewer. I don’t do any of that on a first interview. I talk about me...and my company...and the high standards I have for the way I want the job that this person is interviewing for to be done.

I should probably clarify that I don’t conduct these first interviews without having seen a resume and a cover letter, and I don’t waste my time or the candidate’s time unless I’ve seen something in the paperwork to indicate that this person has the basic skills and capabilities necessary to do the job. But once the first interview is done, the candidate has some idea of what he or she might be getting into. And at the end of the first interview, I challenge the person to think about all he or she has learned about me...and my company...and my high standards... and decide if the job is still something he or she wants to pursue.

The next step—if the candidate decides to take it—is a second interview. This one requires the candidate to do most of the talking. I ask a lot of questions and listen carefully to the answers, because my attitude is that I’m “buying” in this situation, and I want to learn everything I can about whether this “product” is the right one for my company.

My questions are intended to get well beyond the surface information presented in a resume. Remember that what you’re looking for is an indication of how this person is going to act in the future, not just a description of what jobs and responsibilities he or she has had in the past. (You’ll find a list of some of the questions I like to ask in the Appendix section.)

After my questioning is done, I invite the candidate to ask any questions he or she might have. This is where I often gain a final piece of insight that has enabled me to hire well over the years. If the candidate asks good questions, I get excited. Because the kind of selling I want this person to do is a process of asking questions, listening to the answers, and then explaining how my—your—capabilities can meet the client’s needs. A person who can’t—or won’t—ask good questions

can’t sell printing.

The next step—again, if the candidate still shows interest—is a few more interviews. After several hiring failures early in my own sales management career, I made the decision that that I would never hire a salesperson based on fewer than 6 conversations. You might think I spent all of my time talking with sales candidates, but that was not the case. In fact, I usually only talked to them three times, and one of those conversations was often the telephone “pre-interview.” The other three conversations were between the sales candidate and others on my staff. Why? Because I valued their opinions, and because I knew that they would both provide me with another perspective on the candidate, and provide the candidate with another perspective on the job. (Please remember that two important things are going on during the hiring stage; you are trying to make a good hiring decision, and the candidate is trying to make a good career decision!) Still another good reason was that I wanted these other people—often production and/or customer service employees or managers who would have to deal with a new salesperson on a day-to-day basis—to “buy in” on the candidate too.

Again, one of the foundations of sales management success is to hire the right person, not the first person. It takes time to do this right, and you should use every resource at your disposal. And that takes us directly to...

5. PSYCHOLOGICAL TESTING

There are a variety of psychological testing programs that you can use to help you make a hiring decision, and in my opinion, you have to be crazy not to use them. These programs give you a look “beneath the surface,” and that’s extremely important, because it’s easy to be fooled in an interview, especially by someone with an outgoing personality and the ability to say all of the right things. Experienced sales managers will tell you that there’s no one more dangerous in an interview than a sales candidate who can talk but won’t work, and you can really only accurately evaluate one of those factors in an interview.

I’m pretty good at evaluating sales talent, but I’m not infallible. I’ve been fooled before at the interview stage, and I have every expectation that I’m going to be fooled again. That’s why I would never hire someone to work for me without first testing (and checking references! More on that follows.) I want to see what’s below the surface before I make a significant investment like hiring a salesperson, and you should feel the same way.

These testing programs range from 20-30 question personality evaluations at a cost of \$40-\$50 to much

more comprehensive—and costly—testing tools. The one I personally recommend is called the Caliper Profile, a 153-question profile that may take a candidate a couple of hours to complete. Caliper had had a relationship with Printing Industries of America for many years, and they have developed a specific “success model” for a printing salesperson.

The process of administering a Caliper Profile is very simple. First, you call Caliper at 609-924-3800, and ask them to send you a few copies of the test document. (I would do this if I were even thinking about hiring a salesperson. There is no charge at this point, you’ll only be charged when you return a profile for scoring.) Next, you bring the candidate in to complete the profile, and then you fax the score sheet back to Caliper. Later that day (or early the next day if you fax a score sheet back after 2:00 PM Eastern Time), you’ll get a phone call from a Caliper consultant who will tell you exactly how your candidate compares to the Caliper model of a successful printing salesperson, and actually give you a hire/don’t hire recommendation. Shortly after that, you’ll receive a complete written report.

The Caliper Profile costs approximately \$250, and I think the best way for a quick/digital/small commercial printer to use it—or any other psychological testing program—is as a final check before actually offering a job to a candidate you’ve decided you like on the basis of the interview process. I would certainly not spend this kind of money to test every candidate who sent me a resume.

Due Diligence. The bottom line is this: It’s easy to make a mistake in hiring a salesperson, but it’s also pretty easy to prevent mistakes. Take the time and spend the money on a solid psychological testing program. And as part of your *due diligence*, please don’t neglect to ask for and then check references. I know as well as you do that this is a difficult issue in today’s business and social climate, and many past employers will decline to “stick their necks out” by commenting on their experience with your candidate. If you don’t ask, though, you’ll never know, and you’ll have failed to do something that might have prevented what can be a very expensive mistake.

6. TRAINING

I’ve told you that I tend to favor a quick printer hiring young and less experienced salespeople rather than older and more experienced individuals. Part of my reasoning is to keep the amount you have to invest down. Another part goes to the issue of starting out *without* bad habits, and without the “big ticket” mentality that is so much at odds with the kind of orders a quick printer sells.

No matter which part of my reasoning made the most sense to you, that advice leads to two immediate concerns. Where do you find good people—young and green or older and more experienced—and how do you train them to be effective at representing your company and bringing in sales?

I always recommend that the first six months of a new salesperson’s employment be designated as a training phase. That doesn’t mean that they’ll spend that whole time in the shop training. Not by a long shot! What it does mean—and show—is that you recognize the need for training, and that it’s not a short-term process.

The first month should be dedicated to building up product and operational knowledge, especially with a young and inexperienced person. With an older or more experienced person, you might spend less time on any of the individual training activities. But you also might not. Age and previous experience are not always a guarantee of success. Your challenge is always to determine what areas a salesperson needs work in, and provide whatever training is necessary to meet those needs.

It would be reasonable to keep a new, inexperienced salesperson in the shop for two or three full weeks, working at all of the production and customer service functions. Don’t be satisfied to have a salesperson-in-training just *observing* these functions. The best way to learn anything is to *do* it for a while. Keep in mind, though, that it doesn’t always have to be a long while. For example, I think a person who has what it takes to be an effective salesperson should be able to learn all that he/she initially needs to know about the bindery area in a couple of hours.

A salesperson doesn’t have to become proficient at operating all of your machines, but he/she does need to understand their capabilities, and something about the amount of time it takes to run some number of pieces through those processes. Some of that comes from actually working with the equipment, but more will come from working on the customer service side of a hundred or so actual print jobs. For that reason, you should plan to have your salesperson-in-training spend most of his/her initial training time working in the customer service area.

And don’t just turn a trainee over to your staff. If this person is going to report to you, maintain that relationship from the start. Hold a brief meeting every morning, to discuss that day’s training activities and goals. Hold a short “de-brief” at or toward the end of the day, to monitor the progress being made. These meetings will also offer you an chance to talk about current and “typical” customers, and about market and industry trends. Obviously, this is an opportunity to begin provid-

ing market knowledge.

How about selling technique? If you're comfortable with your own selling technique, start to explain it to your trainee during this "inside" phase of training. Start getting the trainee out of the shop on joint calls with you in the third and fourth weeks of this first month. If you're not especially comfortable with selling, there are a variety of other resources you can use, my *PRINTSELLING* video seminar among them. The best idea may be to immerse your trainee in books, articles, audio tapes, and videos on the subject of selling.

The goal of this initial training period is pretty simple, really. It's to get your new salesperson ready enough to go out into the marketplace and take some lumps! Don't forget that selling success is not going to come immediately, no matter how much energy and how large a part of your resources you put into training.

Balance Of Training. The next five months of the formal training program should keep the salesperson out of the shop as much as possible, making sales calls and learning from every experience. Your morning meetings and end-of-day de-briefs become part of the management process.

I also like the idea of making this "outside" segment of the training program at least partially trainee-directed. Let the problems your trainee is having suggest what specific help and training is needed, and then find whatever resource is necessary to provide it. I also like the idea of holding the trainee responsible for "self-training" activities. You might require a total of 20 hours of "self-training" to be completed in months two and three, and maybe reduce that to 10-15 hours in months four, five, and six. These "self-training" activities can include reading, tapes, attending seminars or trade shows—either graphic arts topics or selling topics—or any other activity that would be productive and instructive.

Sales Coaching. How do you feel about the idea of training and managing a salesperson? Does it scare you a little bit? Do you wish there was "professional" help available?

There is! It's called the DF/A Sales Coaching program, and you'll find more information in the Appendix section. You can also call me at any time at 800-325-9634 to learn more.

7. DAY-TO-DAY SALES MANAGEMENT

The first thing you have to understand to be an effective sales manager is that *every* salesperson needs to be managed to at least some degree. There's no better formula for disaster in sales management than

to leave a salesperson completely on his or her own. The vast majority of stories I hear about salesperson failure—and I hear plenty of them—expose a central theme: the salesperson wasn't given adequate management and support.

Management And Support. Those two words—management and support—go together in this business of managing salespeople. It's not just a matter of imposing some sort of discipline over the salesperson. Effective sales management is equally a matter of providing the support structure necessary for success. Support for the salesperson's knowledge and training needs. Support for the positive attitude it takes to go out every day and absorb more *no's* than *yes's*. Support for all of the promises that the salesperson needs to make—and keep—in order to wrestle customers away from other printing companies.

I wrote an article for *Quick Printing* a number of years ago (*August 1991*) that listed the skills required to be an effective sales manager. It's no big deal, I wrote then, you just have to be a combination of teacher, coach, printing expert, parish priest, hero, villain, and mind reader. I hope it's easy for you to see how many of those attributes are directly related to the *support* element of sales management.

Everyone Needs Support. I can't emphasize enough that every salesperson needs support. You may be lucky enough to find that true "self-starter," who doesn't require a great deal of the *discipline* element of sales management. But I'm not sure that I've ever met *anyone* in selling who didn't need help on a regular basis dealing with the problems that a salesperson faces every day.

Not long ago, I was interviewed by a large commercial printing company looking for a management/training consultant. This \$30MM+ printing company had one individual salesperson who was responsible for more than \$7MM in sales. As part of the interview process, one of the questions I was asked was how would I manage this salesperson.

My answer? I said I'd introduce myself, and then I paused for effect. I mean, seriously, what does a person who already knows how to sell \$7MM worth of printing in one year need to hear about selling strategy and technique from me, or from anyone else? But then I continued to say that I'd introduce myself, and let that salesperson know that I'd make it my business to be there to provide whatever support it took for him to keep performing at that level.

Thoughts On A Common Situation. There's an old saying in the printing industry that you usually have

to sell every job twice. First, you have to sell it to the customer. Then you have to go back and sell it to the plant or the shop. When I first got involved with quick printers, I thought that I would find this to be much less of a problem than it often is in the “big-press” world. But I’ve learned that I was wrong, especially when an employee/salesperson is involved.

I’ve heard variations of this theme countless times in my travels. The employee/salesperson works very hard to build and maintain a relationship with a prospect or customer. Somewhere along the line comes a project that may be especially challenging, or may require a very fast turnaround, or something creative that goes beyond the ordinary. The salesperson brings that job back to the shop, often with great pride in the accomplishment, only to be told that “we can’t do that,” or “we can’t do it *like that*” or “we can’t do it in that amount of time.”

What sales management is all about in this situation is support...to find a way for the salesperson to keep the promises that he or she has made. You might think of this element of management as *front-line support*. You might also be thinking, though, that the salesperson may have created the problem, that he or she may really have promised something that simply can’t be delivered. OK, that happens too. But if it does, to me it’s still a *support* issue. The support required may have been better training, a better understanding of your shop’s capabilities or operating standards, or a communication system in place by which the salesperson *consults* with others in the shop during the selling process.

Communication is the true backbone of sales management. And it works best when it’s true *two-way* communication. Much of the communication required between a sales manager and a salesperson can be provided through a call report system, and we’ll talk more about that in a moment. For this moment, it’s important to understand that the sales manager must make a *commitment* to communication, and a commitment to whatever support is required to help a salesperson succeed..

Action Standards. In that *QP* article I mentioned earlier, I wrote that sales management has three components: training, action, and motivation. All three work together in creating successful salespeople. We have discussed training, and we’re going to discuss compensation—the primary element in motivating salespeople—a little farther along.

Action is defined as the process of developing and supervising a consistent and ongoing sales effort. Quite simply, it’s a matter of understanding—and implementing—the quantity of each individual sales activity that is required to create success.

What we’re talking about here is a series of questions. How many cold calls? How many phone calls? How many letters? How many appointments, and how many follow-up calls? These are the basis of what I refer to as *action standards*, and they represent the core of the day-to-day sales management effort.

Numbers Game. As with so many things, there are varying levels of sophistication and “competence” in sales management. And in all honesty, most quick printers are going to have to operate at the lower levels of competence, simply because they lack the experience that creates greater sophistication.

The silver lining in that cloud is that high levels of sophistication in sales management aren’t a requirement for quick printers. That’s because selling is ultimately a numbers game, and quick/digital/small commercial printers have very “good numbers” in their selling situation.

One of the things I teach in the *PRINTSELLING* Seminar is that a quick/digital/small commercial printing salesperson is very unlikely to run out of people to sell to. That’s the first of the “good numbers,” a wealth of prospects. The second of the “good numbers” is that the typical individual sales contact takes a relatively short time. Just the fact that most quick/digital/small commercial printers operate within a relatively small piece of geography contributes to that, minimizing the travel time that eats up so much of so many “broad-territory” salespeople’s days. The bottom line is that a quick/digital/small commercial printing salesperson can make contact with a pretty significant number of people during the forty or so hours that make up the commonly accepted sales work week.

More Contact, More Customers. Another of the things I teach is that you can’t escape this basic arithmetic: regardless of your level of selling skills, the more people you see, the more customers and business you will develop. An inexperienced salesperson may need to contact fifty or even a hundred people to create one customer. A more talented and experienced salesperson might get that ratio down to one out of ten. (One out of ten in outside selling would be *exceptional* by just about any printing sales manager’s standards, by the way.)

What this numbers game gives to a quick/digital/small commercial printing sales manager is the framework for setting action standards that will create success. If you assume in the beginning that it will take contact with fifty prospects to create a customer, your action standards should be designed to make those fifty contacts happen in as little time as possible. It could be a system of activities—like I teach in

PRINTSELLING—that starts with fifty cold calls or other lead-generating activities, followed up by fifty letters, followed up by fifty phone calls that will result in some lesser number of appointments, and ultimately, that one customer.

If fifty cold calls are a reasonable action standard for one week, the fifty follow-up letters could also go out that same week. The fifty phone calls would be made the following week, but I hope you'll see how each previous week's cold calls—or other lead-generating activities—fuel the ongoing process. The action standard for actual appointments might be ten each week, again fueled by the process of lead generation and follow-up.

Are those the right numbers? I can't tell you that, although I think they make a reasonable starting point for a salesperson who's not already tied up in a lot of customer maintenance activity. All you need to understand here is that it's perfectly all right to change the action standards, either as the situation changes, or because they weren't fully reasonable in the first place. Work with your salespeople, if fact, on developing action standards that both of you feel are reasonable. (That's exactly what we do in the DF/A Sales Coaching Program!)

Just remember, though, no matter what the "number" is, the more people your salespeople see, the more customers and business they will develop and the faster they will make it happen. That's really the bottom line on *ongoing* action standards, even for highly experienced salespeople. They give you a means to keep salespeople from "slacking off" as their volume starts to grow. They fight against the tendency to get comfortable, and to get caught up in non-critical, non-selling, customer-maintenance only activities.

Call Reports. I promised that I'd get back to call reports. They provide the means for you to measure compliance with the action standards you've set. But even more so, they provide communications input to the *support* element of sales management, if you design and use them right.

The First Rule Of Call Reports should be to keep them simple. Don't let it take longer to fill out a call report than it does to make a sales contact. A cold call/follow-up log can easily be created to give both you and the salesperson a count of the number of cold calls made, a listing of the contact names identified, the date the follow-up letter was sent, and the date and results of the phone call to ask for an appointment.

A separate report form might be used for the face-to-face appointments. Here, it's important that the salesperson can tell you what he or she is hearing from prospects and customers, what sort of problems and/or

needs these customers have, and what selling problems the salesperson is having.

The Second Rule Of Call Reports should be to use them as two-way communications tools. This can be especially important and valuable to the quick/digital/small commercial printer who manages more than one salesperson. I've had a lot of success in my own sales management career by writing my comments and/or suggestions right on the call report form and sending it back to the salesperson. That allows two-way communication without the requirement for a face-to-face meeting, which can often let both you and the salesperson use time more effectively. It also shows the salespeople that *something of value does happen* with the call reports, and that they're not just an exercise in filling out forms.

Action And Support. The ultimate secret to sales management is simply to be able to communicate to your salespeople what you want them to do, and then to support them in doing it. As I noted earlier, that starts with the hiring and training process, but the real key to effective day-to-day sales management is a system of activities and action standards.

What a system like that gives you is a plan to be followed...a plan that can be measured against and adjusted if necessary. What it also can give you is a clear pathway to success, both in selling and in sales management. Being the sales manager will never be the easiest job in a printshop, but it can be a fairly easy job to be effective at if you understand the components, and put enough *action* and *support* in place.

8. MOTIVATION

My experience in 10+ years of consulting tells me that we're just now getting to the part that many quick printers are most interested in...how do you compensate a quick/digital/small commercial printing salesperson? I get phone calls on this subject on a regular basis, and for the last few months, the calls have been about equally divided between quick printers at the point of hiring an outside sales person, and others who are wrestling with an established compensation plan that doesn't seem to be working. In either case, it's apparent that sales compensation is a very complex puzzle to most quick printers.

How do you solve this puzzle? I think the first step should be a clear understanding of the underlying *purpose* of compensation. And that *purpose* should be viewed from two different perspectives: that of the employee/salesperson and that of the owner.

Three Levels. From either perspective, the underlying purpose of compensation spans three levels.

From the employee/salesperson's perspective, the first level is to cover the basic needs of an individual or perhaps a family...food, clothing, shelter, etc. The second level is to provide the means to maintain—or upgrade to—a certain standard of living beyond those basic needs. The third (and probably least understood) level is that compensation provides an important measuring stick in today's society.

Let's think about that third level for just a moment. We've all heard the expression: "Keeping up with the Jones's." And I don't know about you, but it's been important to me to make more money than some of the other people who are—or have been—part of my life; for example, that guy that my wife once thought about marrying! It's not something I think about every day, but over the years, this has definitely been one of the things that has contributed to my motivation.

And of that takes us to the employer's perspective, where the underlying purpose of compensation on all three levels starts with that word: motivation. On the first level, it's to provide motivation to work to at least a basic performance standard. On the second level, it's to provide motivation to work for you (as opposed to working for another printing company. This is the reflection of a "competitive" compensation plan.)

On the third level, it's to motivate an employee to work beyond that basic performance standard. Again, this is probably the least understood level of purpose underlying compensation, but it's been shown many times that a well-designed compensation plan can point an employee directly toward what you want him/her to be doing. In the case of a quick printing salesperson, I think we're talking about *selling the products and services you want to sell...to the kind of people you want to be selling them to...and at the prices you want to be selling at!*

Three Components. To cover all three levels of purpose, I think a sales compensation plan should be made up of three components: a *guaranteed* component to cover the employee's basic needs and the owner's basic expectations; an *earned* component to cover the "maintain or upgrade" issues and to provide a competitive compensation structure; and an *incentive* component to provide an "extra kick" toward specific behavior and superior performance.

The guaranteed component can be a salary or a draw against commissions...or a combination of both. Since a large part of its purpose is to cover the employee's basic needs, the most important consideration of setting the guaranteed compensation level is that it be sufficient to cover those needs! The next most important consideration is to not set the guaranteed level any higher than it absolutely needs to be! Guaranteed earnings are not

likely to motivate a salesperson to the level of performance you're ultimately looking for.

The earned component of a sales compensation plan will do that, especially when supported by a well-thought-out incentive component. The most effective way to structure the earned component is a percentage of "commission" paid on actual sales volume. The best way to structure the incentive component is to offer one or more "bonus" opportunities to your salesperson throughout the year.

The Bonus Issue. I should mention that the idea of paying bonuses on top of commissions has been rejected by many printing industry owners and sales managers. I often hear the argument that a commission plan provides its own incentive; just sell more printing and you'll make more money!

When you look at the most successful sales organizations, though—both in the printing industry and in other industries—I think you'll find that the vast majority include bonus opportunities in their compensation plans. Why? Because the owners and sales managers in these organizations recognize an important fact about salespeople: the fact that many of them tend to have fairly short attention spans!

Now think about this...that short attention span is actually a positive trait in a salesperson! A typical salesperson is exposed to a great deal of rejection. A typical quick printing salesperson will hear far more "no's" than "yes's" in his/her efforts to establish a customer base. It's important to be able to forget those "no's" quickly and move on to the next prospect, and a short attention span supports that behavior.

Of course, there are also elements of the sales and sales management challenge where a longer attention span is required. A well-thought-out bonus opportunity provides an excellent sales management strategy for establishing and maintaining focus on a specific activity or objective. Bonus opportunities can be set up for the long-term (a full year incentive program) or the short term (up to 90 days). The most important considerations in planning a bonus opportunity are that your objectives are both reasonable and measurable, and that the reward you're offering is significant enough to justify the effort you're asking for. (I'll write more about sales incentive/bonus programs a little farther along.)

Key Questions. The process of developing an effective sales compensation plan is based on the answers to six key questions. The first four are questions the owner/sales manager must answer. The last two are questions for the salesperson or sales candidate. The answers all tie together to define a compen-

sation plan that can work for the entire life of a sales employment relationship. And that's important, because making changes to a salesperson's established compensation plan is without question the most dangerous activity on the sales management side of any business.

The first pair of questions concern the first year of employment (or the first year of employment under a revised compensation plan): How much am I willing to invest in this salesperson in the first (or the next) year? And how much sales volume do I expect to gain in return on that investment? These questions establish your initial investment tolerance. A second pair of questions address the longer term: How much sales volume will I expect from this salesperson three or four years down the road? And how much will I be willing to pay for that sales volume? These questions can head off the situation where you might later feel that a salesperson is making too much money.

Employee Questions. The final pair of questions in the compensation planning process have to be asked by the owner/sales manager and answered by the salesperson/candidate. Those questions are: How much money do you *want* to be making, right now and say, three years from now? And how much money do you *need* to be making right now? It's important to understand that "want" and "need" are two different issues.

You have to cover the "need" from day one, or else this attempt at establishing an outside salesperson is doomed to fail. You don't have to cover the "want" from day one, though. It should be understood by any salesperson or sales candidate that selling is a profession where you can make a lot of money, but you have to sell—to perform—in order to make it happen!

That should also be understood by every owner and sales manager, but it's obvious that it isn't. I think the truth is that many of the quick printers who have tried unsuccessfully to establish an outside salesperson were simply "sold" on an unreasonable guaranteed compensation rate—or unreasonable sales expectations—by the salesperson. Before too long, that quick printer started to compare what was going out to what was coming in, and made the decision that the experiment wasn't working.

Experienced sales managers will tell you that there's a certain category of salespeople who are very dangerous in that way. They can sell themselves to you...they just can't sell your products and services! The best way to screen out that type of salesperson is to establish your tolerances and expectations first, and never let yourself be seduced or intimidated into making a deal that doesn't make sense to you within the framework of those considerations.

One Possible Scenario. Let's say that you as an owner/sales manager answered the first pair of questions like this: a first-year investment tolerance of \$25,000 and an expectation of \$100,000 in sales in that same time period. How about three or four years down the line? Let's say that you're looking for total sales of \$300,000 in the third year, and you're willing to pay \$40,000 for that sales volume. Now, let's also say that you've interviewed a sales candidate who wants to earn \$25,000 this year and get up over \$40,000 by the third or fourth year...but who really only needs \$1500 per month to live on right now.

In this scenario, the arithmetic works out pretty nicely. As a basic compensation plan, I would suggest a salary of \$1000 per month (\$12,000 per year), and a variable commission rate of 8% on "old" business and 10% on "new" business. To that, I'd add one or more bonus opportunities that would add up to \$1500 for the year, and assign the remaining \$1500 to an expense allowance (\$125 per month to offset part of the operating cost of the employee's car and perhaps other miscellaneous expenses.) To make up the difference between the \$1000 per month salary and the salesperson's \$1500 per month compensation requirement, I would allow the salesperson to draw up to \$500 per month against future commissions.

If the salesperson in this scenario reached your first-year sales expectation of \$100,000, he/she would earn \$23,500 plus the additional \$1500 paid out to cover expenses...a total of \$25,000, which is on target with both the salesperson's "wants" and your investment tolerance. (Please note that all of this sales volume would qualify as "new" business and therefore earn the 10% commission rate, unless of course, you assigned a few established customers to the salesperson. In that case, the volume from those customers might be considered as "old" business at the lower commission rate. I think experience has shown that \$100,000 in completely new business is a very reasonable expectation in the first year for a hard working—and smart working—quick printing salesperson. If you assigned, say, \$20,000 of solid existing business to a salesperson, that would justify a first-year overall sales target of \$120,000. It would also justify reducing the salary component to \$10,400 per year [\$867 per month], because the \$1600 in commissions that will be earned from those solid established accounts is essentially guaranteed compensation.)

Now let's look into the future. In this scenario, let's say that your salesperson does hit \$300,000 in the third year...\$250,000 from customers developed in the first two years, and \$50,000 in "new" business. Again, we'll build in a \$1500 bonus opportunity and \$1500 for expenses, along with a salary component of \$1000 per

month, or \$12,000 for the year.

All of that totals up to \$40,000, which, again, is on target with your both salesperson's "wants" and your own compensation tolerance.

A Different Scenario. OK, that particular compensation plan scenario worked out pretty well on paper—for both the employer and the salesperson—but the arithmetic doesn't always work out so nicely. So what do you do when you're faced with a situation in which a candidate's "need" and your investment tolerance is farther apart? Here's a new situation: the same first-year investment tolerance we considered last month (\$25,000) and the same expectation of \$100,000 in sales in that time period; but an otherwise good-looking sales candidate whose "needs" amount to \$3000 per month. How do you work those numbers out?

I think the only sensible answer is that you don't! If you've really thought about how much of an investment you can make, and come up with an investment tolerance of \$25,000, why would you now consider guaranteeing someone \$36,000?

This is a very common mistake, and it's exactly what I meant earlier by being "seduced" or "intimidated" into making a bad deal. Yes, this person may be more mature and/or more experienced than a typical "entry-level" printing salesperson, and therefore capable of bringing business in faster. It's definitely true that you can buy more salesperson for more money. But the real issue is whether you can *afford* to buy more salesperson. Buying something you can't afford almost always ends badly in business, whether you're talking about a press, a copier, a piece of bindery equipment, or an employee!

It's an incontrovertible fact that your current volume level has a lot to do with how much salesperson you can afford to hire...or whether you can afford to hire an outside salesperson in the first place! To address that specific issue, please consider these guidelines: If your current sales volume is \$300,000 or lower, you really can't afford to hire a salesperson. You still have the need to be represented in the marketplace—maybe even more than a larger printer does!—but you simply have to do it yourself. From \$300,000 to \$600,000, you have a little more latitude. At that level, you still have the option of doing it yourself, but you should also be able to afford the \$20,000-\$30,000 annual investment in an "entry-level" or relatively inexperienced salesperson. If your volume is in excess of \$600,000—and you're profitable!—you have even more latitude. At that volume level, your investment tolerance might allow you to consider an experienced printing salesperson with established accounts.

The Risk Factor. Even having said this, I recognize that there may still be quick/digital/small commercial printers who feel pressured into modifying their investment tolerance after running an ad in the newspaper and talking to a few candidates. Here's a situation I've seen before: (1) no strong candidates in the quick printer's price range; (2) at least one good looking candidate who needs more money; and (3), a quick printer who simply isn't willing to go out and make sales calls him/herself.

It's often necessary to take risks in business, but I don't want you taking them here without fully understanding the risks. You can disburse a \$25,000 investment tolerance at the rate of approximately \$2000 per month over a full year, or you can push it out faster, covering a \$3000 per month "need" for approximately eight months. Either approach can work in the long term, but the faster you put money out, the faster you're going to need sales volume coming in to keep your cash flow and your investment in balance.

It is a proven fact that it takes time to build customer relationships. The more time you can allow, the more likely it is that your overall sales strategy is going to succeed. The only situation in which I'd be even remotely comfortable taking a risk like this—accelerating the payout of my investment tolerance—would be with an experienced salesperson who already has established customer relationships.

But even then, I would never base my planning on an expectation that this salesperson could bring all of his/her business over to my company. To be safe, I would plan on no more than a third of any salesperson's established business coming over in the short term. If the arithmetic didn't look good on that basis, I would judge it a bad risk.

The Draw Factor. In any case where a salesperson's "need" was greater than my desired salary component, I would make up the rest of the *guaranteed component* with a draw against commissions. To illustrate the reasoning behind that, let's refer back to the original premise of the sales compensation scenario I presented earlier...that a candidate is able to live on \$1500 per month for at least a few months. In that situation, you'll remember that I suggested making up the difference between a \$1000 salary component and that \$1500 monthly income requirement by allowing a draw of up to \$500 per month against commissions.

Why not just raise the salary to \$1500 per month? Because doing that would dramatically effect the future performance of this compensation plan! If you raise the salary component by \$500 per month (\$6000 per year), in order to balance that out against your first year investment tolerance of \$25,000, you'd have to

lower the “new” business commission rate to 4% and make the “old” business commission rate even lower than that. How much incentive would those lower rates provide for a salesperson to aggressively seek out new business?

Remember, the idea is to develop a compensation plan that will motivate your salesperson. To do that, you want to make the guaranteed component as small as possible so you can make the earned component as large as possible. It’s the earned component that serves as the major motivating factor in any sales compensation plan!

One thing I can promise you is that sooner or later, every printing salesperson finds his/her way onto a plateau where workload and earnings balance off very nicely to provide a “comfort zone.” Please consider which of these statements will have the most impact at that time: “Get off that comfort zone and dig up \$20,000 in new business, for which you’ll earn an additional \$800” (at 4% commissions), or “Get off that comfort zone and dig up \$20,000 in new business, for which you’ll earn an additional \$2000!” (at 10% commissions). As the old saying goes, money talks...and more money talks louder than less money!

Payback. Allowing a draw against commissions lets you provide for the salesperson’s short-term “needs” while maintaining the long-term integrity of your compensation plan. There is a slight down-side, though. The draw has to be repaid before the salesperson’s earnings can rise above the guaranteed level. Let’s say that it takes four months to get to the “break-even” point in this compensation plan, where “new” business sales reach \$5000 per month. If total sales for the first three months were, say, \$8,000, your salesperson would have drawn \$1500 against only \$800 in actual commissions earned. Month 4 would be a break-even at \$5000 in sales, but the salesperson would still be \$700 behind his/her draw. With \$6000 in sales in Month 5, the salesperson would earn \$600 in commissions, but you would only pay \$500, covering the “need” component and applying the additional \$100 toward the draw deficit. With \$8000 in sales in Month 6, the salesperson would pay back another \$300. Then with \$10,000 in sales in Month 7, the draw would be completely repaid, and the salesperson would actually take home more than the guaranteed component of the compensation plan for the first time.

If your sales candidate’s monthly “needs” are higher, the draw will have to be correspondingly higher, and that will increase the payback period—the length of time that your salesperson is compensated only at the guaranteed level. That’s something you should explain carefully when you’re asking the question: “How much do you need to make right now?” And by the way,

experience has shown that the sales figures I’ve just used are fairly reasonable monthly sales expectations. You have to expect a growth curve. It is not reasonable to expect significant sales volume in the first few months with a new salesperson, and that reinforces the importance of the term “investment” in your compensation planning.

Too Much Money? Another issue which needs to be covered at this point is the perception that a particular salesperson is being paid too much. To me, there is no such thing as a salesperson who makes too much money...provided that his/her compensation plan was designed intelligently in the first place. The beauty of a well-designed compensation plan is that the salesperson only makes money when he/she makes money for you! Once that criteria is met, you should be thrilled to give a big paycheck to a salesperson—the bigger the better!

But let’s consider the point at which many quick/small commercial printers seem to decide that they’re paying too much...the point at which orders come in “automatically” from customers the salesperson brought onboard some time ago, and the orders are principally handled by someone other than the salesperson.

To me, this goes directly to the issue of what you pay a salesperson for in the first place. My opinion is that you pay a salesperson to convince people to buy from your company...not to sell orders, but to sell *your company* to potential customers. That’s the hardest part of the selling challenge, but once it’s accomplished, the orders start to flow.

If you feel that you’re paying an established salesperson too much because orders come in now without any apparent effort on his/her part, I think you’re making a mistake. My position is that the money you pay for bringing in the first orders doesn’t nearly compensate the salesperson for the tremendous accomplishment of creating a customer. My definition of “making money for you” is tied to the “lifetime value” of a customer.

That’s not to say that you should pay the same commission rate on orders from “old” customers that you do on orders from “new” customers. As you’ve seen, I’ve already built variable commission rates into my suggestion for an effective compensation plan. But I do think it’s short-sighted to confuse “involvement” in each order with “accomplishment” in compensating quick printing salespeople.

Compensation Load. Now it’s time to introduce you to an important piece of compensation terminology. I refer to the relationship between the direct costs attached to a salesperson and the sales volume he/she is bringing in as the *compensation load*. A first-year

salesperson costing \$25,000 and bringing in \$100,000 would represent a *compensation load* of 25%. Is this good in terms of overall profitability? Absolutely not! But it is *necessary*, and that's a very important understanding for anyone considering the compensation of an outside salesperson.

In real-world compensation planning, you have to consider practical minimums and maximums. The practical minimum annual investment required to hire and maintain a positive motivational relationship with a good entry-level person is going to be somewhere around \$25,000. In some parts of the country, you can probably do it for less than \$20,000, but in other parts, experience has shown that something more like \$30,000-\$35,000 is required. You have to deal with the realities of your own market!

The practical maximum first-year sales expectation for an entry-level quick printing salesperson is somewhere around \$100,000. I know of situations where much higher first-year totals have been realized, but I think you'd be wise to count on a more conservative projection. (As you might suspect, I also know of situations where first-year sales totals have been considerably lower than \$100,000.)

A compensation load of 25%—or even higher—must be expected in the first year with an entry-level salesperson, but with a well-designed compensation plan, the compensation load always goes *down* with increased volume. In the three-year extension of the scenario I presented earlier, \$350,000 in sales and \$45,300 in direct costs yields a third-year compensation load of 12.9%.

Pricing Plays A Role. Now, is *that* good in terms of overall profitability? I think it is, *provided that* the \$350,000 in sales volume is adequately profitable. This is where *pricing* enters the compensation equation. I think it's very important that an outside salesperson sells at your normal profit margins, and this is one of the most critical sales management issues most quick printers face.

I've observed that the typical quick/digital/small commercial printing salesperson—and the typical quick/digital/small commercial printing owner/sales manager—views “getting something to quote on” as a significant accomplishment. Please understand that one of four things will happen with every one of those quotes: (1) you'll get the job at the price you quoted; (2) you won't get the job because your price was “too high;” (3) you'll get the job after finding out that your price was “too high” and asking for a chance to “sharpen your pencil;” or (4) you won't get the job, even though your price was “competitive.”

The key sales management question has to surround

the definitions of “too high” and “competitive.” I've done a fair amount of pricing research over the years, and one of the things I've seen is that there is absolutely no semblance of consistency in pricing among quick/digital/small commercial printers in any given market area. I think John Stewart's pricing research in putting together the last couple of Quick Printing Industry Pricing Studies supports that statement. Look at the “majority high” and “majority low” prices on any given item or category of quick printing in those surveys, and you'll almost always see a variation of at least 30% between the two price levels. The actual difference between the lowest price level reported and the highest price level reported on any item or category was even larger than that!

The Best Strategy. I think you already realize that there's somebody pricing “it” at every level from very high to very low in pretty much every market area. What you may not have given enough thought to is that there's also somebody selling “it” at every level—quick/digital/small commercial printers are getting orders at every pricing level from very high to very low. Just as there is no consistency in pricing, there's also no real consistency in the marketplace in what makes a price “competitive”—it's all in the mind of the individual customer or prospect. With that in mind, I've always felt the best selling strategy is to set your prices up in the higher levels and target your selling efforts on people who will pay those prices!

One of the quickest ways to make an outside salesperson *unprofitable* in the overall—no matter how attractive the compensation load may seem—is to give in to the perception of market-wide price pressure that often comes from the price-sensitive component of any market area. This is another situation where you can't let yourself be seduced or intimidated by your salesperson (who I promise you will blame your prices at some point for some lack of selling success.) The better idea is to tell your salesperson: “We're not interested in the people who think our prices are too high. Your job is to find people who find our prices attractive—especially considering the quality and service and added-value we provide.”

This component of a salesperson's “job description” is part of what you pay for with the guaranteed component of a compensation plan. It is also a behavior you can “motivate” through the earned component. You can do this by establishing variable commission rates based on the profitability of any job. As an example, any job quoted and sold at your normal margins earns the normal commission rate. Any quote which has to be discounted would earn only 75% of the normal commission rate.

As an example of how this might play out, a \$600 job that qualifies as “new” business with a 10% commission rate would earn a salesperson \$60 in commissions. If the salesperson asked you to discount the price by 10% in order to get the job, he/she would share the cost of that concession. The new commission would be 7.5% of \$540, or \$40.50. The loss of a third—or more—of his/her commission on every discounted job should serve as an incentive to seek out value-oriented prospects.

New vs. Old. How about the question of “new” vs. “old” business? There are two ways to look at defining “new” business: new orders coming from completely new customers and new orders gained through greater activity with established accounts. You probably want to encourage both of these behaviors!

Tracking new customer volume is pretty easy, but there is one potentially de-motivating factor that you have to watch out for. It’s contained in the fact that there has to be a cut-off after which a customer is no longer considered new. I’ve found that the best way to manage this situation is to say that a customer is “new” only during the calendar year in which they place their first order, with the exception that anyone who places their first order after October 1 remains “new” until the end of the following calendar year. In this way, you avoid placing a dis-incentive on the aggressive pursuit of new customers toward the end of a calendar year.

Tracking growth with established customers can be a little more complicated, especially if you try to do it on an individual customer basis. I’ve found that the best way to manage this situation is to establish a quota for “old” business. Start with the actual sales volume to that group of customers in the previous year, and add some percentage of expected growth to cover price increase factors or any other environmental factors. Once total sales to those established customers reaches the quota, every additional order is compensated at the new business rate.

Lowering The Load. As I said earlier, I would be happy with a compensation load of 12.9% as long as pricing levels made that volume profitable. Truthfully, anything below 15% would be all right with me. But what if you have lower tolerances? And what if your “product/service mix” takes you beyond the limitations a typical traditional quick/digital/small commercial printing company puts on its salespeople?

What do I mean by limitations? It’s as simple as this: If your equipment supports only short runs and low color, your average order value will almost certainly be lower than that of a company with the equipment to support longer runs and more color. For the sake of

discussion, let’s say that two first year salespeople will each be responsible for 500 orders over the course of the year...something like two orders gained each working day. The salesperson working for a “traditional” shop may end up with a \$200 average order, and \$100,000 in total sales. A salesperson working for a more progressive quick/digital/small commercial printing company with advanced equipment and product/service capabilities might produce an average order of \$500, and \$250,000 in total sales. In future years, that salesperson might very well be able to reach \$1,000,000 in sales...a volume level that’s highly unlikely for someone selling \$200 average orders.

Would you be willing to pay a salesperson more than \$100,000, even if he/she were bringing in \$1,000,000 in sales? I probably would be, as long as the profit margins were there. But maybe we should be considering a different question: Would you *have to* pay a salesperson that well, or would there be people who would be quite happy working for less?

Consider the salesperson who would answer your original compensation planning question with “a shot at \$40,000 in the third or fourth year.” Let’s also say that a forecast of \$500,000 in the fourth year is completely reasonable when considering your company’s equipment list and “product/service mix.” Finally, let’s say that \$400,000 of that total volume will be compensated as “old” business, and \$100,000 as “new” business.

With a \$12,000 per year salary component, \$32,000 in “old” business commissions at 8%, \$10,000 in “new” business commissions at 10%, and a bonus/expenses component of \$4000, that salesperson would receive total compensation of \$58,000. That works out to an 11.6% compensation load, which as I’ve said, would not bother me at all. But if that salesperson would have been perfectly happy earning \$40,000, your compensation load would then have been only 8%, and you’d have missed the opportunity to drop a significant chunk of money straight to your bottom line!

From The Beginning! Here’s what you must appreciate, though: If you want to end up with a very low compensation load, you have to plan for it from the very beginning. I’ve said many times that making changes to a salesperson’s established compensation plan is without question the most dangerous activity on the sales management side of any business. As far too many printing sales managers have learned, once a salesperson perceives that you are taking something away—especially taking money away!—that salesperson usually stops cooperating with you and starts looking for another job.

That’s why it’s so important to ask yourself the second pair of compensation planning questions I

introduced in the first installment in this series: How much sales volume will I expect from this salesperson three or four years down the road? And how much will I be willing to pay for that sales volume? Once you know the starting points and the long-term target, working out the specifics of a compensation plan is just a matter of arithmetic.

Here's an example: a sales candidate with a "need" of \$2000 per month, and a "want" of \$27,500 in the first year with a shot at \$40,000 by the third or fourth year; and a quick/digital/small commercial printing company with equipment and a "product/service mix" that supports a projection of \$250,000 in the first year and \$500,000 in the third year. With a \$1000 per month salary component, a \$1500 bonus opportunity, and another \$1500 assigned to cover expenses, the "new business" commission rate required to reach \$27,500 would be 5%. ($\$27,500 - [\$12,000 + \$1500 + \$1500] = \$12,500$. $\$12,500 \div \$250,000 = 5\%$) To make up the difference between the salary component and the salesperson's immediate "need," I would allow a draw of up to \$1000 per month.

In the third year, let's assume that \$500,000 in total volume will break down as \$400,000 in "old" business and \$100,000 in "new" business. With \$12,000 in salary, a bonus/expenses component of \$4000, and \$5000 in "new" business commissions ($\$100,000 \times 5\%$), we need the "old" business commissions on \$400,000 in volume to add up to \$19,000. That works out to a 4.75% "old" business commission rate and gives us total compensation of \$40,000.

Now, here's the most important part of this example: a commission rate differential of only .25% is unlikely to provide a strong incentive to seek out new business. This is a comfort zone trap looking for a place to happen! If you want this salesperson to continue to seek out new business, you want the "old" business commission rate to be at least a full percentage point lower, and two points would be even better. So let's try this: make the "old" business commission rate 3.5%, and it provides \$14,000 in commissions, which leaves us \$5000 below our earnings target of \$40,000. Now take that \$5000 and add it to the bonus opportunity! It's still there for the salesperson to earn—on the basis of specific performance—and it doesn't disrupt the rest of what you're trying to accomplish with the overall compensation plan!

Straight Commission? One of the questions I'm often asked is whether a quick/digital/small commercial printer wouldn't be better off paying a higher commission rate with no salary? If you were originally willing to invest \$20,000 to get \$100,000 in new sales volume, why not get to that by offering a straight 20% commis-

sion rate?

I guess I look at that from three different perspectives. First, I think the guaranteed component is important in supporting a rookie salesperson through the early days of heavy rejection. Second, the fact that you're paying a *salary* gives you as the employer certain rights that you don't have—or can't as easily enforce—if you're dealing with a straight commissioned salesperson. Finally, think about the second sales year, when this salesperson might bring you in \$250,000 in sales volume. At a straight 20%, you'd be paying that person \$50,000. At \$10,000 plus 10%, you'd be paying out only \$35,000. If you add on the \$5000-\$8000 we used earlier to cover expenses and benefits, the compensation load as a percentage of sales would have come down to 16-17%. That represents a significant additional profit for you. And that's when this salesperson really starts to pay off for you!

Pushing And Pulling. At the very beginning of this section on *Motivation*, I noted that many printing industry sales managers have resisted the idea of paying bonuses on top of commissions. They argue that a commission plan provides its own incentive; just sell more printing and you'll make more money!

The problem with that reasoning is that it doesn't always work in the real world. Sure, a commission salesperson will earn more if he/she sells more, but the critical question is whether the rate of increase provided solely by commission will be enough to stimulate the kind of hard work that you as a sales manager are looking for! In the real world, salespeople tend to gravitate toward plateaus and individual comfort zones. For a sales manager, keeping salespeople off of these comfort zones/plateaus may be the single most important—and difficult—challenge.

Effective sales management is a combination of pushing and pulling. I think most successful sales managers will tell you that the *pulling* is the most effective part. *Pushing* constantly can be frustrating and annoying for both the salesperson and the sales manager, but it's also a fact that most salespeople do need a push from time to time.

Here's the strategy I suggest: use the incentive component of your compensation plan to pull your salespeople toward high performance, and to keep them focused on specific objectives...*your objectives!* That can reduce your pushing requirement to a gentle nudge every once in a while, just to start your bonus programs in motion. As strange as this may sound (since we're talking about people here, not inanimate objects) this is all fully consistent with the basic laws of physics: Newton's First Law states that a body at rest will tend to stay at rest, while a body in

motion will tend to stay in motion.

To continue this analogy between physics and sales motivation, once a salesperson is pushed into motion, the incentive offered (you could think of it as the pot of gold at the end of a rainbow) pulls the salesperson forward and provides the means to overcome “friction”—all of the factors that work against a hard-and-smart day’s work every day.

Bonus Strategy. The first element of bonus strategy should be this question: what *exactly* do you want a salesperson to accomplish? Remember, the guaranteed component of the compensation plan is intended to cover the salesperson’s basic needs, and to justify your requirement for a basic level of performance. The earned component provides the most significant opportunity for the salesperson to establish a high level of income, and also provides your primary means of offering a competitive compensation level. The purpose of the incentive component is to focus the salesperson on exactly what you want him/her to be doing and accomplishing.

The next element of bonus strategy should be this question: what will it take to get the salesperson’s attention and provide enough incentive to support your objectives. To put this simply, the reward—the pot of gold at the end of the rainbow—has to be *big enough* to make earning it worth the effort you are asking for.

Use this rule of thumb: objectives demanding more effort and/or motivation over a longer time period require larger rewards; objectives requiring less effort and/or motivation over shorter time periods can be accomplished with smaller rewards. The definition of “larger” and “smaller” must relate to the target salesperson’s overall income level.

What does all that mean? If you have a salesperson earning in the low ranges—\$20,000 or less—a bonus “pot” of \$1000 for reaching an ambitious full-year sales quota should have the necessary incentive value. It represents enough of an addition to the guaranteed and earned components to make some “stretching” worthwhile. With a salesperson earning in the high ranges—say \$60,000 or more—that bonus worth \$1000 may be too small to provide adequate motivation to attain an ambitious quota. *“I’m already making good money,”* that salesperson might think. *“Why kill myself for something less than another week’s pay?”*

Long Term Incentives. I’ve always liked to make several bonus opportunities available to salespeople each year; one long-term opportunity based on a full-year sales quota or goal, and a couple of short-term opportunities based on 30-90 day volume or action targets. The combination of long-term and short-term

motivation has proven to be very effective

Now here’s a question worth thinking about. Is there any difference between a sales quota and a sales goal? In terms of managing salespeople, I think there definitely is. It’s one thing to point someone toward a goal and say *“Here’s what I’d like to see you accomplish this year.”* It’s something completely different to assign a salesperson a quota and say *“You need to reach this sales figure, or else your job is in jeopardy.”*

Setting a quota does—and should—imply a threat to a salesperson’s continued employment. But by providing the potential for significant reward as well, you address the motivational issue from both sides. The reward pulls from ahead, and the threat of getting fired is there to provide a sometimes-needed push from behind. This is an example of “integrated” sales management strategy. It’s also a combination that will get any reasonable person out of bed in the morning and out making sales calls, which is the behavior we’re trying to motivate in the first place.

A Grace Zone. By the way, I’m not saying that I think every salesperson who fails to meet his/her quota should be fired. I think there should actually be three possibilities. At the “top” end of those possibilities is the salesperson who reaches or exceeds quota and is rewarded with a bonus. At the “bottom” end is the person who doesn’t even get close, who doesn’t work hard enough, who turns out not to have what it takes to meet your sales needs. That person *should* be fired.

In the middle, there should be a “grace zone” for the salesperson who gets most of the way there. By that I mean at least 85%-90%, and showing real potential to do better next year. The “grace zone” is especially important if you end up with any doubts that you might have set quotas too high in the first place. In this “middle” zone, the only pain the salesperson suffers is in not earning the bonus.

Now how do you set all of this up so that it’s consistent with your overall sales and marketing objectives? Start by setting your total company sales goal, and then break out the contribution you need from the salesperson in order to reach that goal. For example, let’s say that your company sales goal is \$600,000 for the year, and to reach that, you’ll need \$200,000 in sales from your outside salesperson. What’s important to understand is that we’re not talking about a *quota* yet. You get the *quota* by “marking up” your component sales goal. For example, if my overall goal required \$200,000 in sales from an outside salesperson, I might set and assign a *quota* of around 110% of that figure...say \$225,000.

In this way, if the salesperson attains his/her quota,

I'll have exceeded that component of my overall sales goal, and I might be well on my way to exceeding that total company goal. By setting the bar a little higher than I need it to be in terms of bonus criteria, I accomplish two things. First, I build a little bit of leeway into the overall business plan on which my cash flow is based. A "grace zone" performance by the salesperson won't necessarily keep me from reaching my overall business goal. Second, I also provide the "funding" for this full-year bonus plan. By making the bonus contingent on a sales figure higher than my cash flow and operating profit projections are based on, the bonus is not actually coming out of projected sales or profits. It's coming directly from the incremental profit on the "margin" between sales goal and sales quota.

There is one more critical consideration in this sort of incentive planning, though. In addition to the requirement that the reward be large enough to justify the effort required to attain it, the quota or goal itself must be reasonable and attainable. An impossible goal or quota will ultimately become a de-motivator, and that's *not* what you're looking for! So, does that mean you may have to reduce the "margin" between goal and quota? No, that's the wrong approach to sales motivation!

The reality is that your overall sales goal is what must may have to be adjusted. If a "marked up" \$200,000 contribution from a salesperson is unreasonable, then the \$600,000 total sales goal in the earlier example is also unreasonable. The only good business decision would be to lower *that* goal.

Short Term Incentives. A long-term, full-year bonus program can serve as the "anchor" to the incentive component of a sales compensation plan. A couple of shorter-term bonus opportunities can create a lot of excitement...especially when you and your salesperson need it the most!

Here are two examples of how short-term incentives can work. Most sales managers believe that getting off to a good start is a critical element of selling success. At the beginning of a selling year, the reward for a long-term bonus opportunity is a long way off. In the shorter-term, you could stimulate a fast start by establishing a quota for the first quarter, or better still, for each of the first three months.

I've had a lot of success with this format: establish a quota for each of the first three months, and then decide how much of a bonus you're willing to pay your salesperson if he/she reaches this quota. Let's say that you're willing to pay a total bonus of \$500. I would break that down into three monthly components. By reaching quota in any one of the three months, the salesperson earns a bonus of \$100. By reaching quota in any two

consecutive months, the bonus in the second month goes up to \$150. By reaching quota in all three months, the bonuses go from \$100 to \$150 to \$250. Do you see how this incremental structure increases the incentive to get off to a good start *and* keep working hard throughout the first quarter of the selling year? And do you see how you only pay the maximum bonus for maximum performance?

Another Example. Here's another example in which a bonus opportunity can be tied directly to your overall business goals. Most quick printers have at least some seasonality in their businesses; at least a couple of months when business is usually soft. Why does this happen? The most prevalent reason is that *your customers* slow down during these months. So one possible strategy for increasing business during these soft months would be to encourage your current customers to do more business during them, but how reasonable is that?

I think a more reasonable strategy is to work at getting new customers to start doing business with you during the slower months. But understand this...you're not going to get significant orders from new customers if your salesperson starts looking for that business during the slow months. The groundwork for those orders has to be laid well in advance of your slow months.

In my *PRINTSELLING* seminar, I teach a systematized approach to selling that starts with a cold call to gain the name of the printing buyer. The next step is a letter, followed by a phone call to ask for an appointment. Let's say that December is your slowest month. In order to be gaining new business in December, the cold call and follow-up part of the selling process needs to start in September!

Here's how I'd structure the bonus opportunity. The working assumption is that more cold calls, letters, and phone calls will result in more appointments—and ultimately more business from new customers. I would set a quota for each activity in September and maybe October too. If the salesperson achieves these quotas, he/she earns the bonus.

In this example, you'll be paying the reward before the sales volume actually comes in, but that's all right with me because the immediate challenge you face is to motivate a behavior that will *result in* sales growth during your otherwise slow period. Think of this particular incentive strategy as an investment!

Cash Or Prizes. Don't forget that whether we're talking about long-term or short-term incentive programs, the quotas must be reasonable and the rewards must relate well to the effort you are trying to motivate. The final question I want to consider is whether those

rewards should be in cash or in other forms, like travel or merchandise. The answer is that there's no categorical answer. Your salespeople are individuals, and each individual is likely to respond to different motivational forces.

The best advice I can suggest, then, is simply to ask your salespeople what sort of rewards they find most appealing. If they want cash, pay cash bonuses. If they express a desire for other reward formats, work them into the incentive component of your compensation plan. Remember, the whole science of compensation planning is intended to motivate your salespeople. The bottom line for success is that you do what it takes on an individual basis.

It's All Just Arithmetic. I know that sales compensation starts out as a complicated puzzle. I hope this discussion has simplified some of the issues for you. Please keep in mind that sales compensation is a science, and that certain causes-and-effects have already been established.

Please also remember the six basic questions that I listed at the beginning of this section. Those six questions will help you to establish the foundation of an effective sales compensation plan, and once you've established that foundation, the rest is really just arithmetic. If you need some help with that arithmetic, why not give me a call? Again, the phone number is 800-325-9634.

9. MORE ON MOTIVATION

What's the bottom line on sales compensation? I think it's that compensation is a simple necessity from the employee's side, but from the employer's side, it's an opportunity. Your choices in structuring a compensation plan provide you with an opportunity to motivate performance to gain *exactly* the results that you want.

An intelligent compensation plan can make your salespeople work both harder *and* smarter. It can tell them what you want them to sell, and what you want them to stay away from. It can tell them very clearly if you want them constantly working on developing new customers, or alternately, it can tell them that you're satisfied to have them handling every detail of every job from their existing customers.

The process starts with some level of guarantee, something you're comfortable in investing and something the employee can live on. From that point on, performance pays! With well designed *guaranteed*, *earned* and *motivational* components, your sales compensation can work equally well for both employer and employee.

But there's more to motivation than money! Of equal importance is that you treat your salesperson like a

valued member of your business team! Part of what that means is to behave consistently in all of your dealings with your salesperson, and not to send contradictory messages.

I've had far too many salespeople tell me that their boss is their worst enemy! When you make the decision to send a salesperson out into the marketplace, you have another very important decision to make: Do you want this salesperson to focus on selling, or do you want him/her to be responsible for other aspects of the operation of your printing company?

Before I go any farther, let me make it clear that you can make either choice. There are plenty of people in the quick/digital/small commercial segment of the printing industry who wear multiple hats, including the outside sales hat. In fact, a "part time" salesperson—part sales and part other operational function(s)—may be the best way for many printing companies to approach outside sales. The economics are quite a bit different between funding a full-time salesperson and allocating 10-15 hours each week of a "fixed" employee's cost to sales activities.

But that's really not what I'm getting at when I present the choice between "selling" and "other aspects." The question I really want you to think about is whether the job description definition of "selling" should really include such things as picking up artwork, estimating, order entry, order tracking, making deliveries, or other printshop-related activities.

Again, this is an area where you have a choice. You can decide that, in your company, the salesperson will do some—or all—of these things. But you can't escape the reality that these activities take time, and any time taken away from prospecting and the ongoing development of new customers and new business is likely to limit the amount of sales volume a salesperson will bring in, and the amount of money that salesperson can make.

Salespeople And Estimating. While we're on this subject, I have a particular prejudice against having an outside salesperson do his/her own estimating. First of all, it's another load factor on the salesperson's time. But probably more importantly, this strategy can be very much like letting the fox guard the henhouse. Think about it, an outside salesperson runs into more expressions of price sensitivity than anyone else in a printing company. In my experience, it's a rare week when a hard-working salesperson *isn't* told at least once or twice that he/she lost a bid because of price!

In order to be a truly profitable contributor to your business, a salesperson has to learn how to overcome price objections, and also how to find people who don't object to your prices in the first place. Unless you've

managed to hire a very rare salesperson, putting pricing in his/her hands is likely to take away some of the urgency to develop those skills. After all, which is easier, overcoming price objections or quoting lower and lower prices in response to the objections you hear?

I think it's a mistake to make a salesperson responsible for both sales volume and profitability. A far better strategy is to make the salesperson responsible for sales volume alone, and ensure the profitability of what he/she sells by putting pricing in the hands of someone who can properly be held responsible for profitability...like a trained estimator, a manager, or the owner!

CLOSING THOUGHTS

Twenty or so pages ago, I started this piece by noting that selling in general is a mystery to many quick/digital/small commercial printers, so hiring and managing salespeople must seem to be up there with the greatest mysteries of all time. You only need to look at the failure rate, I said, to know that something is really wrong in the way outside salespeople are hired, trained, managed and compensated in this industry.

First Key. No one's going to tell you everything you need to know in 20-30 pages of text, but I hope that I've been able to make sales management less of a mystery. The first "key" to success is to hire wisely. As you've read, my best advice is to invest some time on the front end of this process by developing a well-thought-out profile of the person who is most likely to be successful at selling *your kind* of printing/copying to *your kind* of prospects and customers. Use that profile as the foundation of your advertising/networking/search effort...and remember that the best "recruiting" strategy is a multifaceted, comprehensive approach! You don't put all of your eggs in one basket when you're searching for a winning salesperson!

Second Key. When you've identified one or more candidates—by comparing every respondent to your profile!—the second "key" to success is to interview carefully, and remember my comments about finding someone who will *work for you*. If you hire someone who is not a good match for you, I promise that you'll find him/her difficult to train, manage and motivate. Be patient! Invest at least as much time on the "back end" of the hiring process as you did on the "front end." And don't short-circuit your efforts at the end of the hiring process by neglecting to test and check references.

Third Key. The third "key" to success is training, and I'm aware that I've had relatively little to say about the specifics of training here. That's because neither of us know what training will be necessary until we now how your candidate compares to your profile, and to the

printing sales knowledge base. Just remember that any critical knowledge that isn't present in the candidate will have to be trained in, and as a piece of advice, please consider that some of these things will probably be easier for you to teach than others. As a general statement, if you're comfortable teaching the "printing" part but not the "selling" part, you must either hire someone who knows something about selling, or find another resource to handle that part of the training challenge. If you're comfortable teaching the selling part but not the printing part, you'd be wise to profile a person who has some printing experience. With the understanding that some training is almost certain to be necessary (unless you're able to afford to hire a salesperson with significant printing sales experience), you would be wise to hire someone whose training needs match the things that you can teach, things you are comfortable with and confident in your knowledge of.

Fourth Key. The fourth "key" to success is *action management*. This is a very simple issue. You cannot manage the vast majority of salespeople effectively by simply setting a sales goal and saying: "Go For It!" You have to manage their activity—their actions—because *action/activity leads to sales volume*. The best way to end up with the sales volume results you're looking for is to determine what action levels are necessary—how many cold calls, how many letters, how many phone calls, how many appointments—to make it happen. Then, if you simply make sure that those action levels are maintained, you *will* end up with the sales volume you are looking for! Remember what I said about it all being "just arithmetic." This element of sales management is much more a science than an art!

Fifth Key. The fifth and final "key" to success is to motivate your salesperson effectively. This starts with a compensation plan which works both for you and for the salesperson, a plan in which your salesperson earns most of his/her money by performing to—or beyond!—your expectations. We went into great detail in discussing compensation, and I know that some of the examples may have been confusing. If so, my best advice is to go back to that section and read through it again!

And please remember that there is more to effective motivation than money. It is of equal importance that you treat your salesperson like a valued member of your business team, and as I said earlier, part of what that means is to behave consistently in all of your dealings with your salesperson, and not to send contradictory messages. Another part of what it means is to pat your salesperson on the back every once in a while, both when he/she does good things and when he/she

has setbacks.

It's hard work being a printing salesperson, and it's often lonely work too! One of the most interesting things we've learned in the DF/A Sales Coaching Program is that most quick/digital/small commercial printing salespeople feel like they're very much alone on the job—as the only person on the staff who works “outside” of the friendly walls of a printshop. Remember that most of the people who come into your shop or send you orders in any other way are saying “yes,” but most of the people a salesperson tries to convince to do just that will say “no.” When it's really being done right—when a salesperson is working very hard at his/her job and putting forth high levels of action/activity—the vast majority of people on the receiving end of all of that action/activity are saying “no” to that salesperson. That can be pretty depressing, as you can probably imagine.

Sometimes the most important element of sales management is to be there to say: “It's OK that most of them say ‘no,’ because you really need relatively few ‘yes's’ to be successful at this.” And that's absolutely

true! Your salesperson may have to “start the ball rolling” with 50 prospects in order to gain one customer, but if he/she starts the process on 50 prospects each week, the end result will be 52 new customers in a year! That may look like only a 2% success rate, but in the big picture, wouldn't it likely reflect a very good year for you and your salesperson in terms of sales volume?

This Can Be Done! OK, there's no question that all of this represents a significant challenge. And again, I hope I've been able to clear up some of the mystery you might have perceived in effectively hiring, training, managing and motivating a quick/digital/small commercial printing salesperson. I very much want you to know that this *can be done*, and hiring a salesperson can have a tremendous positive impact on your business.

I also want you to know that I'm available to help you meet this challenge in person. Check out the first page of the Appendix for more information on my sales coaching program...or call me at 800-325-9634!

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A P P E N D I X

Dave Fellman's Sales Coaching Program

Are you happy with the performance of your salespeople?
Are you confident in your own sales or sales management abilities?
Could you use some help in making outside sales work for your company?

If you answered **no, no** and **yes!** to those three questions, Dave Fellman's Sales Coaching program could be the solution to your problem. Think of sales coaching as a combination of sales training and sales management support. It works with underachieving employees, and it also works with printshop owners who know that they need to get out and sell, but lack sales knowledge and direction. It works because Dave Fellman has been a successful printing salesperson and sales manager. It works because he'll provide proven strategy and technique—both selling technique and time management / organizational strategy—and he'll hold your salesperson (or you!) accountable for a level of activity that will produce the results you're looking for."



Call Dave Fellman at 800-325-9634
visit www.davefellman.com

The Cost

4X Level Service: \$450 per month.

2X Level Service: \$250 per month.

1X Level Service: \$150 per month.

Payment terms: Monthly draft from Visa, Mastercard or American Express account.

**Your complete satisfaction
is guaranteed!**

That's Why It Works, Here's How It Works!

4X Level Service:

Each 4X Level participant will take part in four telephone coaching and/or conference call sessions each month, scheduled as much as possible on the same day and time each week

Private Coaching Calls

How much prospecting is going on? Is time being used effectively? What's working and what's not working in the pursuit of new business? What will it take to solve selling problems with current customers, and to overcome the objections of important prospects? These are the issues that are covered during each month's Private Coaching Calls. Dave Fellman provides ongoing sales training, accountability, sales management support, tips and ideas.

Small Group Conference Calls

From time to time. Level 1 participants are invited to take part in interactive, small group conference calls, led by Dave Fellman or occasionally by a topic expert, which provide the opportunity to "compare notes" with others facing similar selling challenges. When conference calls are offered (never more than once each month) they replace the private coaching call for that week.

2X and 1X Level Service:

After 3-4 months, most 4X Level participants find that a reduced level of service is sufficient, and the cost of the program drops accordingly. Dave considers it his responsibility to "graduate" his students to independent performance!

SALES COACHING IMPROVES SALES PERFORMANCE!

Developing A Profile...

Here's a copy of a "questionnaire" I prepared for one of my clients to form the basis of a sales candidate profile. The actual profile that resulted from his answers follows...

1. What is your first-year sales expectation for a new salesperson?

lowest acceptable level	\$	
reasonable level of success	\$	
exceptional performance	\$	or above

2. How much are you willing to pay for that "reasonable expectation" of sales volume?
(Please provide two numbers...a cash compensation figure and the expected value of benefits.)

3. What is your third-year sales expectation for a new salesperson?

lowest acceptable level	\$	
reasonable level of success	\$	
exceptional performance	\$	or above

4. How much are you willing to pay for that "reasonable expectation" of sales volume?
(Again, please provide two numbers...a cash compensation figure and the expected value of benefits.)

5. All other things being equal, would you prefer a younger person or an older person? A male or a female? Do you have any specific feelings regarding minority vs. mainstream? (You don't have to write the answer to this question down, but I would like you to think about them.)

6. What educational background do you think the job requires?

7. If a college degree is required, do you have any preference for a particular (local) college or university??

8. How much—if any—selling experience do you feel the job requires?

9. If some selling experience is required, what specific product/service sales experience do you feel will provide the likelihood of rapid skills translation.

10. How much—if any—printing/copying/graphic arts experience do you feel the job requires?

11. Please make a list of 8-10 "attributes" you feel will be important to success at this job, and after completing the "raw" list, please re-arrange the items in priority order.

12. When do you expect a salesperson's workday to begin? When do you expect it to end? Do you envision salespeople starting and finishing most days at the shop?

13. How far from your shop should/could a candidate live?

14. Does it make a difference what type of car a candidate drives?

15. What are the specific things that have made (any current/previous salesperson) successful? Please try to arrange the factors in order of importance.

16. What have you learned from previous salespeople who didn't work out? What other "plusses" and "minuses" can you think of?

Developing A Profile...

Client's Actual Sales Candidate Profile:

We are looking for two people who are motivated to:

1. **learn** our business
2. **call** on strangers and **develop** relationships
3. call on *the right people* and develop **profitable** relationships
4. work as part of a **team**
5. increase personal earnings on the strength of **performance**

The ideal candidate is probably a woman between the ages of 28-55 with modest initial compensation requirements (\$1800 - 2200 per month "need" for the first 4-6 months; \$24,000 - \$28,000 "want" for the first full year.) **[40 Points]**

We are looking for "professionally attractive" candidates, which we define as:

- projecting **self-confidence** and possessing an obvious **native intelligence** **[10 Points]**
- being an excellent communicator; **strong verbal and written communication skills** **[10 Points]**
- possessing **strong basic math skills** **[5 Points]**
- being **well-organized** and having a "**problem solving**" orientation **[5 Points]**
- being **poised** and **businesslike** in terms of dress and physical appearance **[5 Points]**
- owning a **dependable and presentable motor vehicle** **[5 Points]**

We do not require a college degree, but would consider one a plus.
(A degree from "State U" would be considered an extra plus.) **[5 Points]**

We do not require specific printing/copying/graphic arts experience, but would consider that a plus. **[5 Points]**

We do not require computer/word processing/computer graphics experience, but would consider that a major plus. **[10 Points]**

We expect a 45-50 hour work week. We don't expect every day to begin and/or end at the shop, but we do require each salesperson to provide a **daily "sales plan"** via personal delivery, fax or e-mail (at least for the first six months of employment.) We also require each salesperson to turn in a **weekly summary of prospecting and sales activity** via a common report format.

We expect to test each "finalist" candidate with an instrument such as the Caliper Profile. We will require the candidates cooperation, and will share the results of such a profile if requested.

Success Measurement Criteria:

- **during the first six months, we will measure activity rather than sales volume**
- for the first year, we will consider the following levels of success:
 - lowest acceptable level: \$60,000
 - reasonable level of success: \$175,000 - \$200,000 (approx. \$28,000 income)
 - exceptional performance: \$210,000+
- by the third year, we will consider the following levels of success:
 - lowest acceptable level: \$480,000
 - reasonable level of success: \$700,000 - \$750,000 (approx. \$54,000 income)
 - exceptional performance: \$900,000+

21 Pretty Good Questions To Ask A Potential Salesperson

By David M. Fellman
President, DF/A

Several years ago, I wrote an article for *Quick Printing* called “15 Pretty Good Questions.” Those were “selling questions,” intended to be asked during the first face-to-face conversation with a new prospect. The article listed the questions, and also provided some explanation about why I wanted the information, and what kind of answers I was looking for to help me in identifying good prospects.

Last week, a reader called me and mentioned that article, and asked me if I’d consider writing a similar article on questions that could/should be asked when interviewing potential salespeople. I came up with 21 “Pretty Good Questions,” and here they are. How’s that for *customer service!*

1. What do you expect a typical day on this job to be like?

One of the most important sales management concepts I teach is that a salesperson needs to know certain things in order to succeed. I’ve written before about the Printing Sales Knowledge Base, which consists of Product Knowledge, Market Knowledge, Operational Knowledge and Selling Technique. It’s important to understand, though, that all the knowledge in the world won’t lead to success unless the salesperson is willing to work hard. The answer I’m looking for when I ask this question revolves around starting early, working late, and putting plenty of sales-building activity in between. If I don’t get that answer, I set the questioning aside and tell the candidate *exactly* what I will expect in terms of a typical day, and I close those comments by telling the candidate “if this isn’t what you had in mind—or if you’re not willing to make this your typical day—let’s do us both a favor and end this conversation right now.”

2. On a scale of 1-10, how would you rate your “printing/copying product knowledge?” Once you’ve established that the necessary work ethic seems to be present, it’s time to evaluate other key elements of the Printing Sales Knowledge Base. The situation you face is pretty straightforward in that any necessary knowledge the candidate doesn’t already have will have to be “trained in.” Remember, a resume will tell you about experience, but it doesn’t

always tell you about knowledge. Also remember that a person trying to sell himself/herself into a job may exaggerate things like experience and knowledge. I recently interviewed a candidate who rated himself a “9” on printing/copying product knowledge, so I asked him an immediate follow-up question. “Can you tell me,” I asked, “how the ink gets on the paper?” The candidate did a fairly good job of explaining the production process from “camera-ready” artwork to a printing plate to how the ink goes on the plate and then gets “offset” to the blanket and then deposited on the paper. I felt pretty good about his product knowledge at that point

3. On a scale of 1-10, how would you rate your knowledge of selling strategy and technique?

Obviously, this question takes the same approach to another of the key elements of the Printing Sales Knowledge Base. Remember that a low self-rating is not necessarily a disqualifying factor. We’d all like to hire “9s” and “10s,” but the reality of the situation is that most quick printers are forced by simple economics to hire salespeople at the low end of the compensation scale—which translates to low levels of experience and knowledge. Again, remember that any knowledge that isn’t already present will have to be trained in. Your objective during the interview stage is to make sure that you have a clear understanding of the training challenge ahead of you with each candidate.

4. How much money will you need to make from Day 1 on this job?

Most candidates will try to answer this question by telling you how much they *want* to make, but that’s not the question you’re asking! The most critical piece of information for you at this point is how much he/she needs in order to cover food/clothing/shelter/etc. As I’ve written before, you don’t have to cover the “want” from Day 1, you just have to provide a reasonable opportunity to reach that income level. You do have to cover the “need” from Day 1, though—whatever it will take for this candidate to live some semblance of a normal life while he/she is building customer relationships and eventually bring in business—so you have to establish early just how much money that is.

If you're not willing to cover what any candidate really needs, don't hire that person! (For a more detailed discussion of compensation, you might look back to a series of articles I wrote for *QP* a couple of years ago, titled "Solving The Sales Compensation Puzzle." If you don't save back issues of *QP*, drop me a line via fax or e-mail and I'll send you a copy. My fax number is 919-467-2357, and my e-mail address is fellman@lynxus.com.)

5. How much money do you want to make in your first full year? By your third year? Here's where you establish the "want" level. If the first-year and third-year "wants" are reasonable, you can move forward with the interview. If not, you'd be wise to stop and tell the candidate *now* that he/she may not be able to earn that much money within a one-year or three-year timeframe. Remember, if the money doesn't work, neither will the relationship between you and your salesperson. Remember also that the interviewing process is a two way street. You're trying to make a good hiring decision, and the candidate is trying to make a good career decision. Both parties need the truth on the table to provide a win-win situation.

6. What would you say your greatest strengths are as a person? This question takes us into the "getting to know you" part of the interview. Remember that what you're getting here is an opinion—a salesperson's opinion!—which is likely to be at least a little bit self serving. The trick here is to *listen* to that opinion, and then hold it up to examination in terms of everything else the candidate says and does during the interview process. For example, if he/she says that being "hardworking" is a personal strength, listen for examples of previous hard work in the answers to subsequent questions.

7. What would you say your greatest strengths are as a salesperson? This question provides a subtle opportunity to measure how much a candidate really knows about selling. Personal strengths definitely translate into selling strengths, but there are a few things that stand out especially as selling strengths, like organization, the ability and willingness to *listen*, self-discipline, and perseverance.

8. What are your weaknesses as a person? Everyone has weaknesses, and an intelligent manager takes a three-pronged approach to dealing with them in a job candidate: (1) identify any weaknesses early and decide if they're really important within the job description, (2) start the process of shoring up those weaknesses, or else (3) make the decision not to hire this particular individual. Shoring up any weaknesses falls into the category of *training*, and just as any necessary knowledge that isn't already present will have to be trained in, any weaknesses and/or bad

habits will have to be trained out! Keep in mind that some personal "weaknesses" can be turned into real positives in a salesperson. I recently interviewed a sales candidate who told me that his greatest weakness was impatience, and I told him there's a fine line between impatience as a weakness and impatience as a very strong motivating factor. "If you're willing to work on finding the balance," I said, "we can use this to make you a more successful salesperson. But if you expect great success and big money to come quickly in selling, hiring you would be a big mistake for both of us."

9. What do you think my next question is going to be? The answer—which I hope is obvious to you!—is: "What are your weaknesses as a salesperson?" So why not simply ask the question straight out? Because this is an opportunity to measure both the listening skills and the intelligence of a candidate, and it's my feeling that anyone who doesn't pick up the pattern of the three previous questions either isn't listening—which is a *very* serious weakness in a salesperson—or isn't smart enough to get you the results you're looking for. With candidates who do pick up the pattern, you're back to the three-pronged approach to any weaknesses mentioned above. By the way, in all four of these strengths/weaknesses questions, look for the sense that you're getting an honest and objective appraisal—not a sales pitch!

10. What is the single biggest reason behind your desire to make a change right now? Unless you're interviewing a person looking for his/her very first job in life, any interest in the job you're offering represents a desire for change. The reasoning behind that change can be very important, especially with a person who wants to leave another job to come to work for you. From my perspective, there can only be two situations that would bring this about...either there's something wrong with the other job or else there's something wrong with the person! (One of my clients recently interviewed a woman whose only reason for looking for a new job was that her husband had been transferred to my client's area. What was "wrong" with her old job was that it was now 600 miles away! Another client recently interviewed a young man who had also moved, but in this case, his resume showed a pattern of moving—not just from job to job, but from state to state. Do you see what I'm getting at?) Some candidates will have a whole list of reasons to give you. I recommend that you try to keep the conversation focused on "the single biggest issue," if for no other reason than to see if your candidate can identify his strongest selling point and drive it home!

11. If I called your last employer right now, what

would he/she say about you? To this point in the interview, we've given the candidate the opportunity to tell some of his/her own story. This question introduces an element of corroboration. In a way, you're asking the candidate to furnish his/her own reference. Do you accept it at face value? Absolutely not! After the interview (assuming that you still feel you have a legitimate candidate after the interview is over) you call that last employer and ask for a reference! Sure, you won't always find the other person willing to talk much about your candidate, but even *that* tells you something about the relationship they had. What's important is that you do everything you can to learn about the candidate and evaluate his/her suitability for the job. By the way, the first time I heard this question, I was on the other side of the interviewing process...being interviewed for a job that I wanted very much. The interviewer listened to my answer, then he picked up the telephone and called my last employer with me sitting right there in his office! My old boss wasn't in as it turned out, but that technique certainly gave me something to think about if I was tempted to "stretch" an answer during the rest of the interview!

12. If I called a few of the people you've worked with over the years, what would they say about you? This question invites a perspective other than that of "the boss." The truth of the matter is that there are many legitimate "personality conflicts" in the workplace. Haven't you ever worked for someone you thought was less capable as a manager than you've turned out to be? Again, though, don't accept the answer to this question at face value. Get the names and phone numbers of these former co-workers and call them. As Ronald Reagan said about the Russians during the nuclear arms reduction negotiations in the 80s: "Trust...but verify!"

13. How are you going to go about finding new customers? The next few questions are intended to facilitate a "conversation" about the nature of the job itself. I put that word in parenthesis because I want to emphasize that the flow of the interview changes here. For the most part, up until now it's been you asking questions and the candidate answering. Now I want you to take a more active role in the discussion. Let's say that the candidate mentions buying directories and networking through the Chamber of Commerce, but what you have in mind is more of a "feet-on-the-street" strategy—cold calls to identify decision-makers followed by an introductory letter followed by a telephone call to ask for an appointment. "I have something different in mind," you tell the candidate, and you describe your approach. "What do you think about doing it that way?" Remember

what I said earlier...you're trying to make a good hiring decision, and the candidate is trying to make a good career decision. Getting everything on the table in the interview stage increases the likelihood of a successful experience.

14. What do you think will be the most important thing(s) you'll have to convince people of in order to turn them into customers? Again, listen to what he/she thinks and then explain your own thoughts. I get excited when a candidate says something to the effect of "I have to sell myself," or "I have to build trust and confidence."

15. Do you have any thoughts on how to meet those challenges? You're still in "conversation mode," but this is also an opportunity to evaluate your candidate's previous experience and/or basic instincts. Please consider, though, that "I have no idea, and I hope you're going to be able to teach me" may be a legitimate answer from someone with no sales experience. If that's ever the answer you get, remember that any necessary knowledge which isn't already present will have to be trained in. If you're not up to the training challenge, don't hire the individual!

16. How do you plan to go about learning what you need to know in order to do this job? This question starts a transition back out of "conversation mode." It's an opportunity to gain your candidate's thoughts on this issue, and to describe your own thoughts on a training program. I think it's important, though, to establish early on that you're both going to have to deal with limited training time and training resources. Make it clear that some self-directed training will be required, and try to come out of this portion of the conversation with some idea of how that will happen.

17. How do you plan to make yourself part of our team? This is a critical issue! There's probably nothing as disruptive to a small printing company as a new salesperson. The new person is "elsewhere" for much of the day—at least hopefully!—and still tends to stimulate questions/problems/mistakes that everyone else has to deal with. I'm interested in the candidate's thoughts on this issue, but truthfully, I'm more interested in simply raising the issue and getting the candidate thinking about his/her relationship with the rest of the organization early on.

18. What is it going to take to motivate you to get out there and work hard at this every day? You can talk all you want about salary and commissions, the bottom line is that money is only one of the motivating factors for most people. It's also probably the least effective motivator in the early stages, when the things a salesperson *should be* doing—lots

of prospecting and follow-up—don't usually lead to "instant cash gratification." If you want to give yourself the best chance of success with an outside salesperson, it's important to understand the entire motivational mix. Don't guess at what will motivate this particular candidate...ask!

19. OK, we're at the point where you have to try to close the sale. Why should I hire you? Now you're completely out of "conversation mode." This question gives you a great opportunity to evaluate the candidate's selling skills. The most important sale a candidate has to make, after all, is to sell you on the idea that he/she is the right person for the job.

20. If you were me right now, would you be most worried about in terms of making an investment in you? This question asks the candidate to play the devil's advocate (which by the way is another important selling skill.) A candidate who told me there was nothing to worry about would scare me to death! So would a candidate who gave me an honest answer, and then left it at that. What I'm looking for is the candidate who will identify the problem and then present a solution. "I guess I'd be most concerned that I'm pretty young and not very experienced," a candidate might say, "but I think the other side of that coin is that I'm very enthusiastic about an opportunity like this, and the experience I do have suggests that I'll be a good investment." Again, this is a means

to measure selling skill (or perhaps instinct in the case of a young or inexperienced candidate.)

21. What question(s) haven't I asked that I should be asking? This last question gives the candidate an opportunity to put anything else on the table that he/she feels is relevant. It also provides a nice transition for the candidate to ask a few questions. I'm always impressed by a candidate who takes that opportunity without waiting to be asked if he/she has questions. Questioning, after all, is an important selling skill.

The way I see it, your primary objective in conducting a face-to-face interview is to get to know the person you're talking with. A resume or application form will tell you some—maybe even much—of what you need to know about a person's background and experience. Remember, though, you aren't simply hiring background and experience...you're hiring a *person* whom you hope has been truthful about his or her background and experience, and will ultimately be able to put some of it to work for your company.

If you look at it that way, do you see *how little* you might learn if you limit an interview to quickly "going over" the resume or application form? You're a lot better off if you can identify and confront some of the "success/failure issues" that surround every position and every applicant. Hopefully, these "Pretty Good Questions" will help you to do that.

Getting Your ACT Together

By David M. Fellman
President, DF/A

Back in 1991—not long after I started writing regularly for *Quick Printing* and consulting with quick/digital/small commercial printers—I presented a seminar in Dallas with the local BCT as a sponsor. After sitting through the session, John Purtell, the owner of that BCT, mentioned that I might be interested in looking at a "sales software" product called ACT. If I remember right, the developer of this product was John's neighbor, and the product was new enough that the company—then called Contact Software International—was eager to send me a free copy for evaluation.

In the years since then, Contact Software International sold the product to software giant Symantec, and ACT has become the top seller among PIM's (Personal Information Managers) and CM's (Contact Managers.) There are other good products in this category—including Goldmine, Maximizer and Telemagic—but

for my money, ACT is still the best. And more importantly, ACT has become the literal backbone of my own business. I start every day by asking ACT to show me my "task list" for the day, and then I simply work my way through those tasks.

I don't always finish every item on my daily list, but that's OK because I've set it up so that any uncompleted task rolls over to the next day's list. The bottom line is that I never lose track of anything I've entered into ACT, and that's a huge benefit for any business person...especially a salesperson!

Four Components

Broken down to its basics, ACT is made up four components: a database, the tasklist, a calendar and a word processor. Everything starts with the database, and the first step in using the program is to enter in all of your contact information—company names, contact names, addresses, phone numbers, etc. As you might imagine, it is extremely important to make sure that this information is complete!

The next step is to tell your database exactly what you want to do next with each contact and when you want to do it. ACT lets you schedule three types of activities: telephone calls, appointments, and things-to-do.

One of the key features of the program is its flexibility, and I think I'm a pretty good example of a person who has adapted the program to his own needs. For example, I never use ACT's calendar functions. I prefer to schedule all of my activities to the task list, because most of what I do is what ACT refers to as "timeless"—meaning that it doesn't have to be done at a specific time of any given day.

On a typical day, my task list is made up of 25-30 telephone calls and 4-5 things-to-do (which might range from writing a proposal to making travel arrangements for a seminar or client visit to writing my monthly column for *QP*.) I use ACT in conjunction with a paper calendar—a typical view-of-the-month format—and that's where I keep track of my travel and "face-to-face" commitments. (More on that later.)

The Windows and Mac versions of ACT work a little differently. I'm currently using ACT 3.0 for Windows. (There's a Version 4.0 out, but I tend to "leapfrog" application software updates unless I see something important being added. The refinements in ACT 4.0 seemed to be mostly Internet-oriented, and that doesn't add much to the way I use the product. In terms of the interface and the way the database and scheduling functions work, versions W3.0 and W4.0 are very similar.)

The ACT "window" is split into two "panes." The top pane holds all of the basic contact information, with fields for company name, contact name, title, phone and fax numbers, address, last results, and an ID/status field that can be used to "code" the contact by type. By clicking on the "lookup" title on the menu bar, you can search the entire database for specific records. For example, let's say you have a customer named John Smith who works for ABC Enterprises in Chicago which is coded by type as a "manufacturer." The most direct way to call up that individual record would be lookup/company/ABC Enterprises, but you could also access it in other ways, including lookup/first name/John, lookup/last name/Smith, lookup/ID/manufacturer, lookup/city/Chicago or even lookup/phone number/312.

If you're looking for a specific individual record, these more "general" search criteria may require you to click through several other records to get to the one you want, but that's only a matter of a couple of seconds. In another situation, though, you might want to send a special mailing to all of the "manufacturers" in your database, and lookup/ID/manufacturer would be just

the ticket.

The Lower Pane

The lower pane of the ACT window contains seven tabs that allow you to switch between views. Five of these views give you access to alternate contact information fields, including several user-definable fields which allow you to add a considerable level of sophistication to your database. The other two views really represent the heart of the system: activities and notes/history.

Every time you schedule an activity—a telephone call, an appointment, or a thing-to-do—it transfers into this view, so when you're looking at a record, you can see everything you have planned for that contact in the future. And every time you complete an activity or add something to the "last results" field, it transfers directly into the notes/history view, so by switching to this screen, you can see everything that has happened in the past. You can also enter notes of any length into this field, which adds to the level of detail you can keep at your fingertips.

ACT in Action

Let's look at ACT in action. "Chris" is a quick printing salesperson, and on this particular day, she's out making cold calls. During the course of the afternoon, she walks into 15 offices, talks briefly with the "gatekeeper" in each one, and decides that 7 of the companies are worth following up with. On her cold calls, she makes sure to get the name of the printing buyer, and all of the correct address/phone information. Her basic strategy is to follow-up immediately with an introductory letter, and then call on the phone to ask for an appointment.

On returning to the shop at the end of the day, Chris fires up her computer and starts entering the information she's collected into ACT. Opening a new contact record requires only one mouse click, and even though she's not a great typist, entering the contact information takes only a few minutes per record. With three more mouse clicks, Chris opens up the word processor and calls up her standard cold-call follow up letter (which she has previously written and saved as a letter template.) ACT automatically merges the name and address of each new prospect with this standard letter, and all Chris has to do now is print and sign the letters, print, stuff and seal the envelopes, and then put them in the mail.

Her last step with each new prospect is to schedule the next activity—the phone call to ask for an appointment. For each record in this group of new prospects, she clicks on an icon which calls up the "schedule a phone call" dialog box, clicks on an icon within that box to call up calendar, and then clicks on the date on

which she wants to make the phone call. She types a short note about the purpose of the call, and rates the activity as a high, medium or low priority. Then she puts that particular prospect out of her mind.

Now let's fast-forward to the day on which Chris has planned on making those calls. She comes into the shop in the morning, and with two mouse clicks she asks ACT for her task list. Along with any other activities she has previously scheduled for that day, she'll find these 7 calls listed. With two more mouse clicks, she turns her task list into a "lookup"—which brings up the complete contact records for each customer or prospect she has something scheduled with today, arranged one-after-another like a card file. Now she simply works her way through the "cards" and completes each task, marking it as completed when she finishes, and then scheduling the next activity for each contact.

Key To Success

This single element—always scheduling the *next* activity—is really the key to using ACT (or any other contact manager) effectively. This is how a salesperson ensures that nothing falls through the cracks.

Let's say that Chris calls the first of her new prospects, and that person says: "I'm really busy this week, but we buy a lot of printing and I'm unhappy with the printer we've been using and I would be interested in getting together with you. Why don't you call me in two or three weeks." ACT makes it very easy for Chris to remind herself to make that call.

Here's another scenario: Chris has quotes out with 10 customers and/or prospects. As a sales manager, you certainly want her to follow up on all of those quotes. For one thing—as many salespeople have found—sometimes all you have to do to get the order *is to ask for the order*. For another thing, even if you don't get the order, you want to get feedback regarding why not. Again, ACT makes it very easy to schedule those follow-up calls and make sure they don't fall through the cracks.

Here's a third consideration: I wrote last month that I have nearly all of the customers and prospects in my own ACT database set up on "critical contact intervals." That means that I have established some time period that I don't want to let go by without either me hearing from these customers or prospects or them hearing from me. Chris, too, has quite a few "occasional" customers who don't order every month, but they are a valuable part of your business. ACT makes it very easy to maintain an appropriate level of contact with those customers.

Not Completely Paperless

I mentioned earlier that I use ACT in combination

with a paper calendar. It's theoretically possible to avoid that by using ACT with a laptop or a palmtop and carrying it everywhere you go, but even ACT's designers seem to have considered that a poor option. In fact, they built in compatibility with a variety of Day-Timer, DayRunner, Franklin and Avery planning calendar formats, making it easy to integrate ACT with those paper-based systems. Chris can print her calendar for the day, the week, or the month, and carry that with her when she's out making calls.

Or, she can print her tasklist for the day, week, or month, which is what I do when I travel. In its default format, the tasklist carries the company name, contact name, and phone number for every activity scheduled within the time period of the report, along with a listing of all pending activities for those contacts.

Before leaving home on a speaking or consulting trip, I print a tasklist for the day(s) I'll be away, and then it's only a matter of making the phone calls—from my cell phone, from pay phones, hotel phones, etc.—and writing notes on those calls on the tasklist form itself. Then, when I get back to my office, I simply transfer all of that information into ACT and schedule the next activity for each contact.

Laptop Benefits

Many salespeople use ACT on laptop computers, and there are a couple of significant benefits to doing that. There's one significant limitation, though, and that's simply the time it would take to boot up the computer after every single sales call. To my mind, it's a lot more efficient to "travel light" and transfer information into the computer once or twice a day.

Having said that, using ACT with a laptop does provide a great deal of flexibility by allowing a salesperson to work from just about any location. One of my more successful clients starts each day in the office at about 8:15 AM by firing up his laptop and making telephone calls until 9:00 or 9:30 AM. He enters the results of those calls directly into the computer, and then, when he's ready to leave the shop, he prints a list of his appointments and the tasks that remain.

During the course of the morning, he'll keep some of those appointments and address some of those tasks—making notes on his tasklist form—then at lunchtime, he'll fire up the computer wherever he may be and spend a few minutes updating his database. During the afternoon he takes care of the rest of his tasklist, including anything that requires him to go back to the shop.

This client doesn't stop to update the computer during the afternoon, though; he holds off on that until he's at home in the evening, which really allows him to maximize the "selling" portion of the day.

Sales Management Benefit

I hope you'll see how a product like ACT can provide support and structure for a salesperson. Here's a significant sales management benefit it can provide as well—with ACT, it's pretty easy for an owner/sales manager to examine a salesperson's database to see exactly what's going on: who the salesperson is calling on, what the salesperson and his/her customers and prospects are talking about; what the salesperson has planned for future activities with each customer or prospect.

Of course, all of that requires that the salesperson is conscientious about entering information into the database, but I would make it clear to my salesperson that that's simply a condition of employment! Any contact manager is a garbage in/garbage out proposition, but the other side of the coin in this case would be quality in/huge benefits out—for both the salesperson and his/her employer.

What does ACT cost? I've seen "street" prices in

computer and office supply stores and catalogs recently ranging from \$149.00 to \$179.00. If you have to buy a computer to go with it, obviously that's a more expensive proposition, but it seems to be a pretty rare printshop these days that doesn't have at least one computer available for a salesperson's use. And if you don't have a machine available, there are "older technology" laptops available for less than \$1000 that would be more than adequate for running ACT.

One more question you might ask...is ACT hard to use? The answer is "no," although some salespeople may need some help in mastering some of the finer points of the software. The good news here is that there are hundreds of ACT trainers across the country, along with a selection of books, videos and interactive CD's. You'll find information about these training options inside the package when you buy a copy of ACT.

I know that many quick printers have expressed the hope that a salesperson would get his/her act together. ACT is one very solid tool to help make that happen!

Sample Job Description For A Printing Sales Representative

You are employed as an **OUTSIDE SALESPERSON** by this company because you possess certain key characteristics, and your job will be defined by the following responsibilities and expectations.

Key Characteristics:

- self-confidence and native intelligence
- strong verbal and written communication skills and strong basic math skills
- well-organized with a "problem solving" orientation
- poised and businesslike in terms of dress and physical appearance

Key Responsibilities:

(This example is meant to provide you with a comprehensive listing of possible responsibilities. In constructing your own written job description, you should include only the responsibilities you want to be part of *your* salesperson's job! Remember that all of this is yours to decide, but that every assigned responsibility will take up a portion of your salesperson's time. The more service/administrative responsibilities you assign, the less time your salesperson will have available for prospecting and developing new business.)

- Prospect aggressively and develop new customers through the use of cold calls, follow up letters, and telephone calls leading to appointments. (This level of detail is important!)
 - Prospect through the use of mailing/marketing list(s)
 - Prospect through the use of referrals
 - Prospect through networking activities (Lead Groups, Chamber of Commerce functions, etc.)
 - Develop a comprehensive knowledge of our capabilities and the benefits we provide.
 - Pursue customers who recognize our value, as opposed to those who buy only on the basis of price.
 - Pursue customers who require the kind of printing/copying we are best equipped to produce.
 - Enter all appropriate customer and prospect information into a contact management database
- (continued on next page)

- Use the contact management database to maintain appropriate contact with all customers and prospect
- Provide an appropriate level of service to established customers
- Provide complete specifications on all projects to estimator
- Estimate own prices
- Pick up orders and/or artwork and transport them to production
- Write up all orders (or enter all orders into printshop management software program.)
- Assist at the front counter as required
- Assist in production as required
- Deliver finished orders to customers as required
- Complete all daily/weekly call reports and/or expense reports and turn in to management as directed
- Assist in the collection of overdue invoices
- Represent our company with honesty and dignity at all times.

Work Day/Workplace Expectations

(Again, this is meant to provide you with ideas, now necessarily to reflect what you *should* require.)

- Begin each day at our shop by 8:30 AM and finish each day at our shop, no earlier than 5:00 PM
- You do not have to begin or end every day at the shop, but we expect you to be working at company business by no later than 8:30 AM and until at least 5:00 PM every day.
- Take no more than 30 minutes for lunch and/or personal business during the workday
- Dress in a manner appropriate to your activities
- Sell only on behalf of our company; no brokering “on the side” will be tolerated
- You must work under a non-compete agreement

Measure of Performance

- Your performance will be measured against a monthly or annual sales quota
- Additionally, your performance will be measured against your compliance with company rules, regulations and policies
- Your performance will be measured against “action standards” which we will assign you; how many cold calls, how many sales letters, how many appointments, how many new customers, etc...all within a specified timeframe

Specific Performance Measurement Criteria:

(Once more, this is meant to provide you with ideas, now necessarily to reflect what you *should* require.)

- **during the first six months, we will measure *activity* rather than sales volume**
- for the first year, we will consider the following levels of performance:
 - lowest acceptable level: \$60,000
 - reasonable level of success: \$175,000 - \$200,000 (providing you with approx. \$28,000 income)
 - exceptional performance: \$210,000+
- by the third year, we will consider the following levels of performance:
 - lowest acceptable level: \$480,000
 - reasonable level of success: \$700,000 - \$750,000 (providing you with approx. \$54,000 income)
 - exceptional performance: \$900,000+

Compensation

- As long as you maintain full compliance with your responsibilities as defined in this job description, you will be compensated with a salary of \$1000 per month, along with 10% commissions on gross sales volume, and bonus opportunities which we may provide.
- You will receive your salary by check on the first Friday of every month, and you will receive your commissions by check on the third Friday of every month.
- If any customer invoice is not paid within 60 days, your commission on that sale will be forfeited, and deducted from your next commission check

A Selection Of Sample "Help Wanted" Ads

Please feel free to modify these ads to reflect your specific situation. Text in [brackets] is meant to be personalized.

PRINTING SALES: Salesperson wanted for small but very well equipped local printing company. [\$25-30K] first year earnings w/considerably higher potential. Printing industry experience and/or business-to-business sales experience a plus. Send resume w/cover letter to: PRINTING SALES, [Your Address, Attn: Your Name.]

PRINTING SALES: Experienced Only! Salesperson wanted with experience *and* active customers. Earnings commensurate with your experience and the volume you can bring. Respond by phone, fax or e-mail for immediate interview. [Your Name/Your Company Name];Telephone [Your Number]; fax [Your Number]; e-mail [Your E-Mail Address].

ENTRY LEVEL SALES OPPORTUNITY: If you have the drive to succeed, we have the perfect opportunity for you! The Printing Industry is one of the most dynamic industries in the US, and we are one of this area's most progressive printing companies. Salary plus commission, and we'll provide training to help you get off to a fast start. Send resume with cover letter to: PRINTING SALES, [Your Address, Attn: Your Name.]

PRINTING/GRAPHICS SALES: We're one of the area's leading printing/graphics companies, and if you're a winning salesperson, we want you on our team! Salary plus commission leading to high earnings potential. Printing industry experience and/or sales experience [required/a plus]. Call for an immediate interview! [Your Number]

DIGITAL PRINTING SALES: Digital is the future of printing and we are there now! If you have digital printing sales experience, or traditional printing experience and a desire to move into the future with a cutting-edge company, contact us by phone, fax or e-mail. [Your Company Name];Telephone [Your Number]; fax [Your Number]; e-mail [Your E-Mail Address].

PRINTING SALES: Salesperson wanted to take over an established local territory. This is a great opportunity for a service-oriented individual. Previous sales experience is not required, but printing industry work experience would be a big plus! Contact [Your Name/Your Company Name];Telephone [Your Number]; fax [Your Number]; e-mail [Your E-Mail Address].

Printing Sales: IF YOU'RE A WINNER, WE'RE THE TEAM YOU NEED TO BE ON!

If you are an experienced printing salesperson who is worried about losing accounts because of quality and service problems at your current employer, come and talk to us! We know how to take very good care of *you and your customers*, and we'll give the support you need to gain new customers too!

Call [Your Name] at [Your Number], or fax your resume to [Your Fax Number]

Digital Printing Sales Opportunity

We have the equipment and the technology if you have the experience and the drive to succeed.

High earnings opportunity
for the right person!

Call [Your Name] at [Your Company Name]: [Your Phone Number]

Are You Working INSIDE A Printing Company Now And Looking For An OUTSIDE Opportunity?

We are looking for a person who is knowledgeable about printing to train as an outside salesperson. We offer a solid initial compensation package and the opportunity for exceptional earnings. We're well equipped, and poised to grow, and *you might be the missing piece!*

Contact [Your Name/Your Company Name];Telephone [Your Number]; fax [Your Number]; e-mail [Your E-Mail Address].

If you are an experienced and talented Printing Salesperson

with active accounts who will follow you to a new opportunity, call me at [Your Number]. Ask for [Your First Name]. High earnings potential!



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Writing good, solid, *compelling* sales and marketing letters is a rare talent. These 36 letters are more than just casual correspondence...they're arranged as 9 complete *marketing programs*; for prospecting, selling more to existing customers, revitalizing inactive accounts, gaining referrals, even credit and collections situations!

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Check Attached Please charge my Visa Mastercard AMEX

Name as it appears on card _____

Card No. _____ Exp. Date _____

Signature _____

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