

# Developing an Effective Sales Organization

By: Sarah Johnson

Successful sales organizations need to have four key components working together in order to be effective, according to Larry Bildstein of the Whetstone Group. Those components include:

- Strategic marketing
- Marketing & sales support
- Sales people
- Sales manager

Each component has a specific role to play in the success and effectiveness of a sales organization. When beginning to develop your sales organization, you must start by defining these roles and setting expectations. Bildstein recommends starting by setting good growth goals. Areas that should be addressed include:

- Who should be involved?
- What specific activities need to be done?
- What do we need (new work, projects resold, etc.)?
- What projects must be replaced?

After addressing these and other key areas, you can begin setting growth goals. Bildstein cautions that you need to set your bar high and be specific. Once the bar is set, begin to define roles and responsibilities. Everyone can play a role in the growth of a CPA firm, despite their level in the organization. Roles will depend on level of experience and which growth strategy best meets the style, desire and personal skills of the individual. Below are examples of staff responsibilities.

## **Role of Staff:**

The role of staff will be first and foremost retention. Retention rates play an important role in the growth of an organization. Your staff's primary responsibility should be providing outstanding client service. In order to do this, your organization will first need to define what outstanding client service is and what the client should experience when dealing with your firm. Once defined, staff must learn to execute it. Staff should begin learning more about the services the firm offers, too.

## **Role of Senior Staff:**

Senior level staff should have slightly higher expectations and should be starting to develop sales skills and knowledge. This should include obtaining product confidence, interacting with client personnel, looking for client needs and observing and communicating observations to partners. Senior staff should also be given the opportunity to ask high gain questions.

## **Role of Managers:**

By the time your employees reach a management position, they should have mastered the skills above and should be working on relationship and sales skills. Also, managers should thoroughly know the firm's business and its marketing plan, have developed strong relationships with clients' decision makers, develop referral sources and build relationships in the community, understand the sales cycle and what is required to make it work and participate in the proposal process.

## **Role of Partners:**

By the time you have made partner, you should be able or on your way to developing business. You should be completely immersed in the sales cycle, handling sales calls, managing relationships with clients at the highest levels, mastering the proposal process, providing positive energy for the firm, leading by example and mentoring the managers and staff.

Once you have defined the roles, communicate them along with expectations to everyone in your firm. You will need to communicate how their role will help the firm achieve their growth goals. Once you have done that, you can then begin to correlate marketing and sales activities to each of these roles and watch your firm grow.

*This article is a summary of material presented by Larry Bildstein, Whetstone Group, during his "Developing an Effective Sales Organization" presentation at the 2006 AAM Summit: Mile High Marketing.*

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