

I	The Code of Ethics p.2	X	Client Evaluation p.67
	<ul style="list-style-type: none">■ A case for defining ethical salesmanship■ How to create a Code of Ethics for your company		<ul style="list-style-type: none">■ Assessing customer value■ Client strategic importance■ Client significance■ Client profitability■ Client fit■ Evaluating clients by the numbers■ The client review
II	Customer Perception Research p.7	XI	Analyzing and Measuring Competitors p.80
	<ul style="list-style-type: none">■ Understanding customer perceptions■ Customer Perception surveys■ Councils, focus groups, and targeted sales calls		<ul style="list-style-type: none">■ The D&B Report■ Customer focus groups■ The Unsuccessful Quotation Report■ The Competitor Scorecard
III	Pricing Strategies p.18	XII	Sales Hiring p.84
	<ul style="list-style-type: none">■ Target Sales Pricing■ Value Added Pricing■ Market Pricing		<ul style="list-style-type: none">■ Sources of sales personnel■ Strategic hiring
IV	Sales Staff Incentives p.22	XIII	Sales Job Descriptions p.90
	<ul style="list-style-type: none">■ Maintaining a team mentality	XIV	NAPL Resources p.101
V	Sales Compensation p.24		
	<ul style="list-style-type: none">■ Cost of sales ratio■ Understanding sales compensation plans■ How companies pay■ Calculating commissionable sales■ Cost of benefits■ Executing the plan		
VI	Account Development and Management p.37		
	<ul style="list-style-type: none">■ The Weekly Business Planner		
VII	Sales Performance Evaluation p.40		
	<ul style="list-style-type: none">■ Sales rep performance evaluation process		
VIII	The Sales Meeting p.43		
	<ul style="list-style-type: none">■ Template Sales Meeting Agenda■ Examples		
IX	Sales Training p.47		
	<ul style="list-style-type: none">■ Training checklist■ Training program examples		



XIII . Sales Job Descriptions

Sources of Sales Personnel

Job descriptions are an important yet frequently overlooked part of the successful sales equation. They communicate expectations and, in doing so they establish an important reference point for measuring whether a salesperson is fulfilling his or her obligations to the company and, similarly, whether the company is fulfilling its obligations to the salesperson.

The following worksheet is designed to help you define what your company will expect from its sales force. Sample Job descriptions from NAPL's Business Advisory Team case files also follow.

Worksheet

Sales Representative Responsibilities

Instructions: Create a list of expectations your company has of its sales representatives.
Which of the following apply to your company?
What can you add to the list?

- ☐ Set and achieve sales and personal goals.
- ☐ Secure accurate and detailed specifications and present them in writing to estimating and production following the established format.
- ☐ Suggest pricing strategies for attaining established sales goals.
- ☐ Keep sales management informed of the status of accounts and prospects.
- ☐ Submit travel, entertainment, and other sales expenses and supporting documentation in a timely way.
- ☐ Participate in company entertainment, trade show, marketing and promotional events.
- ☐ Advance individual learning and value to the company through ongoing participation in meetings, seminars, reading, and other educational venues.
- ☐ Represent the company in a manner consistent with its culture and values.

Worksheet – Sales Representative Responsibilities - Continued

- ☐ Maintain a personal appearance that reflects professionalism.
- ☐ Advance teamwork through cooperation with all employees and departments.
- ☐ Offer suggestions that improve the quality and service our company provides, and the profitability it generates.
- ☐ Plan and organize time and travel to maximize customer contact, maintain superior customer service, and achieve consistent sales results.
- ☐ Maintain and report changes to customer and prospect lists.
- ☐ Actively promote and market all the company's capabilities.
- ☐ Ensure that all charges accrued on every job are billed.
- ☐ Participate in the collection of overdue accounts.
- ☐ Obtain credit approval on new clients and ongoing business as required.
- ☐ Actively pursue prospective customers through cold calling and participation in company-organized marketing initiatives.
- ☐ Add Other:

Sample Job Descriptions – Sales Position

Smithville Printing Company

Job Description

Job Title: Account Executive

Department: Sales

Reports to: Vice President of Sales

SUMMARY: Sell company services by developing new accounts and servicing existing ones.

ESSENTIAL DUTIES AND RESPONSIBILITIES include but are not limited to the following. Other duties may be assigned as needed.

- Research prospects with needs which match our capabilities. Develop them into customers.
- Maintain existing customer relationships by contacting them on a regular basis and updating them on our capabilities.
- Assist customers in planning jobs, offering creative ideas on design, layout, printing, bindery and mailing options.
- Obtain customer job specifications in detail, and work with customer service representatives and estimators to provide accurate estimates. Review estimates for efficiency and accuracy.
- Work closely with CSR's, providing them with accurate and complete information.
- Obtain accurate customer deadline dates and advise CSR's and customers when deadlines must be changed.
- Advise customers of prices for author's alterations and changes of specifications. Obtain approval to authorize plant to proceed with production.
- Establish final selling price. Negotiate any disputed pricing with customers. Make every effort to balance customer and company needs.
- Work within company credit guidelines and procedures on new and existing accounts and assist with collections if necessary.
- Analyze lost quotations to determine sales, marketing, pricing, equipment problems or trends in our industry. Report to management as necessary.
- Lend feedback on customer satisfaction in regards to quality and service, good and bad.
- Stay abreast of competitor's activities.
- Suggest new markets, products or procedures to better serve our customers and company.
- Maintain customer and prospect database for company promotional mailings and e-communications.
- Attend scheduled sales meetings and participate in training to learn new services and methods to help customers.
- Accurately report use of time and expenses for government reporting.
- Work interchangeably with other representatives to cover for them in their absence.

QUALIFICATIONS:

- High school diploma or equivalent
- 2-4 years selling experience in a printing company
- Possess a comprehensive knowledge of printing and mailing processes.

Sample Job Descriptions – Sales Position

Rocket Printing

Job Description

Job Title: Sales Representative
Department: Sales & Marketing
Supervisor: Sales Manager

SUMMARY

Generate sales (direct and indirect).

ESSENTIAL DUTIES AND RESPONSIBILITIES

Include the following. Other duties may be assigned.

Compile lists of prospective customers for use as sales leads, based on information from newspapers, business directories, industry ads, trade shows, Internet Web sites, and other sources.

Travel to or call on regular and prospective customers to solicit orders, or talk with customers by phone.

Display or demonstrate company's capabilities using samples and multi-media. Emphasize salable features.

Quote prices and credit terms, and prepare sales agreements for orders obtained.

Estimate date of delivery to customer, based on knowledge of our company's production and delivery schedules.

Prepare reports of business transactions and keep expense accounts.

Work with inside sales representatives to keep account activities and literature up to date.

Coordinate customer training.

Enter new customer data and other sales data into computer database.

Investigate and resolve customer problems with deliveries.

Attend trade shows.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Sample Job Descriptions – Sales Position – Continued**Rocket Printing**

Sales Representative Job Description – Page 2

EDUCATION and/or EXPERIENCE

Associate degree or equivalent from two-year college or technical school; or six months to one year related experience and/or training; or equivalent combination of education and experience.

LANGUAGE SKILLS

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

MATHEMATICAL SKILLS

Ability to calculate figures and amounts such as discounts, interest, weight, bulk, proportions, percentages, area, and volume. Ability to apply concepts of basic algebra and geometry.

REASONING ABILITY

Ability to solve practical problems and deal with a variety of variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

PHYSICAL DEMANDS

The physical demands are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

WORK ENVIRONMENT

The work environment is representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Sample Job Descriptions – Senior Sales Position

Applied Graphic Solutions

Job Description

Job Title: Sales Manager
Department: Marketing and Sales
Reports to: President/Owner

SUMMARY

Manage sales activities of organization by performing the following duties personally or through subordinates and other supervisors.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Include the following. Other duties may be assigned.

Develop and implement strategic sales plans to accommodate corporate goals.

Direct sales forecasting activities and set performance goals accordingly.

Review market analyses to determine customer needs, price schedules, and discount rates.

Direct staffing, training, and performance evaluations to develop and control sales program.

Direct channel development activity and coordinate sales distribution by establishing sales territories, quotas, and goals.

Advise dealers, distributor, and clients concerning sales and advertising techniques.

Assign sales territory to sales representatives.

Analyze sales statistics to formulate policy and assist dealers in promoting sales.

Direct product simplification and standardization to eliminate unprofitable items from sales line.

Represent company at trade association meetings to promote product.

Deliver sales presentations to key clients in coordination with sales representatives.

Meet with key clients, assisting sales representative with maintaining relationships and negotiating and closing deals.

Coordinate liaison between sales department and other sales related units.

Analyze and control expenditures of division to conform to budgetary requirements.

Assist other departments within organization to prepare manuals and technical publications.

Sample Job Descriptions – Senior Sales Position – Continued**Applied Graphic Solutions**

Job Description – Page 2

ESSENTIAL DUTIES AND RESPONSIBILITIES – Continued

Prepare periodic sales report showing sales volume, potential sales, and areas of proposed client base expansion.

Direct product research and development.

Monitor and evaluate the activities and products of the competition.

Recommend or approve budget, expenditures, and appropriations for research and development work.

SUPERVISORY RESPONSIBILITIES

Directly supervise 3 to 4 employees in Sales. Carry out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

QUALIFICATIONS

To perform this job successfully an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE

Bachelor's degree from four-year college or university; or five to six years related experience and/or training; or equivalent combination of education and experience.

LANGUAGE SKILLS

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

REASONING ABILITY

Ability to solve practical problems and deal with a variety of variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

Sample Job Descriptions – Vice President of Sales**Corporate Communications Solutions, Inc.****Job Description****Job Title:** Vice President of Sales**Department:** Sales**Reports to:** Chief Executive Officer**SUMMARY:**

The Vice President of Sales is a member of the CCS Senior Executive Team, and as such is responsible for creating and delivering long term, sustainable value to the organization. This individual works with the Senior Management Team to develop overall goals and direction for the company, and provides the leadership and direction for the sales area to implement and accomplish those goals.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Include but are not limited to the following. Other duties may be assigned as needed.

- Provide executive leadership as a key member of the senior management team on all sales related issues.
- Participate in setting company goals and objectives at the senior level.
- Manage the company's sales team to achieve established goals and objectives.
- Establish ongoing product and process training, and help the sales force weave that knowledge into their sales presentations.
- Help the sales force set and realize goals, monitor their progress, and provide reports as required for the Senior Management Team.
- Work with Vice President of Marketing and CEO to establish, implement, monitor, and adjust marketing plans to achieve objectives, maintain growth and profitability.
- Investigate and evaluate target business markets on an ongoing basis. Become knowledgeable about trends within those markets through trade publications, industry contacts, and trade shows.
- Create incentive/bonus programs to motivate the sales force, while maintaining sound compensation and benefit programs.
- Develop the appropriate tools to educate sales staff, customers and prospects on company capabilities.

Functional Responsibilities

- Build a productive sales team.
- Develop goals and objectives for the sales team.
- Conduct planning sessions.
- Oversee time and territory management.
- Develop and qualify prospects.

Sample Job Descriptions – Vice President of Sales – Continued**Corporate Communications Solutions, Inc.**

Job Description – Page 2

- Monitor sales activities of individual accounts to fine-tune target marketing plan.
- Watch for emerging technology and market trends to help direct the company towards new sales and new customers.
- Understand all the interrelated aspects of the company, and know how to deal effectively with the different components.
- Train or retrain other departments to respond to new needs, helping them refocus and redirect efforts.
- Delegate tasks.
- Manage conflict.
- Resolve personnel grievances.
- Display a commitment for growth.
- Manage a growing workforce.
- Work closely with Vice President of Sales Support to coordinate internal customer service and estimating.
- Be able to differentiate between real and perceived excuses, problems, or issues.
- Lead brainstorming sessions and initiate group discussions.
- Set a good example in your work and personal ethic.

Motivation and Coaching

- Create incentive/bonus programs to motivate sales force.
- Discover what motivates sales representatives and how to use that information effectively.
- Communicate sales and company goals effectively.
- Inspire confidence among the sales force.
- Motivate, encourage, and steer sales representatives toward their goals.
- Help the sales force understand the customers they call on and how they can help these companies perform better.
- Encourage creativity.

Human Relations

- Recruit, interview, and hire sales staff.
- Understand personalities and behavior styles of different kinds of people.
- Ask the right questions in an interview.
- Match sales representatives to the appropriate accounts.

Sample Job Descriptions – Vice President of Sales – Continued**Corporate Communications Solutions, Inc.**

Job Description – Page 3

Human Relations – Continued

- Establish sound compensation and benefits practices.
- Evaluate performance.
- Give recognition for outstanding effort.
- Initiate disciplinary measures.
- Comply with lawful employment practices.

Training, Coaching and Motivating Staff

- Develop educational training programs for staff.
- Train staff to work with interrelated departments.
- Use employee involvement in teams, recognition, and rewards.
- Motivate and empower employees.

Selling and Training Others to Sell

Vice President of Sales must be able to perform these functions and train the sales force to:

- Ask for the sale.
- Follow up and follow through.
- Negotiate and handle conflict.
- Manage territory effectively.
- Manage time effectively.
- Recognize loss of customers due to new technologies.
- Cold call or use other techniques to get new customers.
- Determine appropriate accounts.

Customer Relations

- Educate customers on our capabilities.
- Build effective presentations using sales aids and other visuals.
- Build trust

QUALIFICATIONS:**Education and experience**

- Senior sales level experience in the printing/graphics industry.

Sample Job Descriptions – Vice President of Sales – Continued**Corporate Communications Solutions, Inc.**

Job Description – Page 4

Education and experience – Continued

- Management/leadership experience in a fast paced, customer-centric environment.
- P&L budgeting experience.
- Proven track record for delivering results.
- BA/BS in marketing, business administration, or related field desired.

Leadership

- Understand the company's manufacturing processes.
- Understand exactly what we are selling.
- Understand the benefits and features of working with our company.
- Understand our target markets.
- Understand the production workflow at the company.
- Understand sales staff styles and needs.
- Understand buyer styles and needs.

A good sales force reflects the attitude and drive of its leadership. The Vice President of Sales must be able to communicate enthusiasm and dynamism to the sales force. This person must have the following:

- Effective communication skills, including listening skills.
- Negotiation skills in order to deal with objections and price resistance.
- Time management skills.
- Motivational skills.

NAPL's Management Plus™: WorkPlan for Success™ is an ambitious effort to bring the concepts and theories of industry best practices to each NAPL member – in a format that can be readily put into action. If the hundreds of Management Plus Best Practices are *ingredients*, then the WorkPlan is the *cookbook*!

Guided by the contributions of NAPL's professional staff, Business Advisory Team and dozens of active, successful members, the WorkPlan stands as a unique member benefit – and one with value that far exceeds the dues investment.

NAPL is dedicated to improving our member's business acumen. In a time when technical proficiency is regarded as a “given” and when competition comes not only from across the street, but from across the globe as well, a company's success or failure may be determined by how well it is managed.

Built upon the foundation of Management Plus Best Practices, WorkPlan delivers practical guidance, templates, worksheets and real-life examples to help in critical areas of graphic arts business management:

- **Strategic Planning**
- **Sales**
- **Marketing**
- **Operations**
- **Finance**
- **Human Resources – Leadership**

The Management Plus system defines the concepts. WorkPlan brings them to life. NAPL's Business Advisory Team stands ready to help with one-on-one insight, guidance and strategies for your company's specific needs and challenges. Whether you do it yourself, or do it with help, NAPL stands ready to help along your road to success — every step of the way.

WorkPlan Content:

NAPL's Management Plus™: WorkPlan for Success™ is created and provided for the sole use of NAPL Corporate-level members (see member benefit criteria). Rights of reproduction or other use are restricted to the authorized member. The contents of all material available in WorkPlan are copyrighted by NAPL unless otherwise indicated. All rights are reserved by NAPL, and content may not be reproduced, downloaded, disseminated, published, or transferred in any form or by any means, except with the prior written permission of NAPL, or as indicated below. Authorized members of NAPL may download or print WorkPlan pages for their own company's use. However, no part of such content may be otherwise or subsequently reproduced, downloaded, disseminated, published, or transferred, in any form or by any means, except with the prior written permission of and with express attribution to NAPL. Copyright infringement is a violation of federal law subject to criminal and civil penalties.

NAPL's Management Plus™: WorkPlan for Success™ contains templates, worksheets and illustrations that you may implement or alter to fit your company's specific needs. As these are designed to be examples, and due to the fact that laws and regulations vary depending on your circumstances and location, it is recommended that you obtain the necessary legal and financial guidance from properly licensed professionals as may be appropriate.