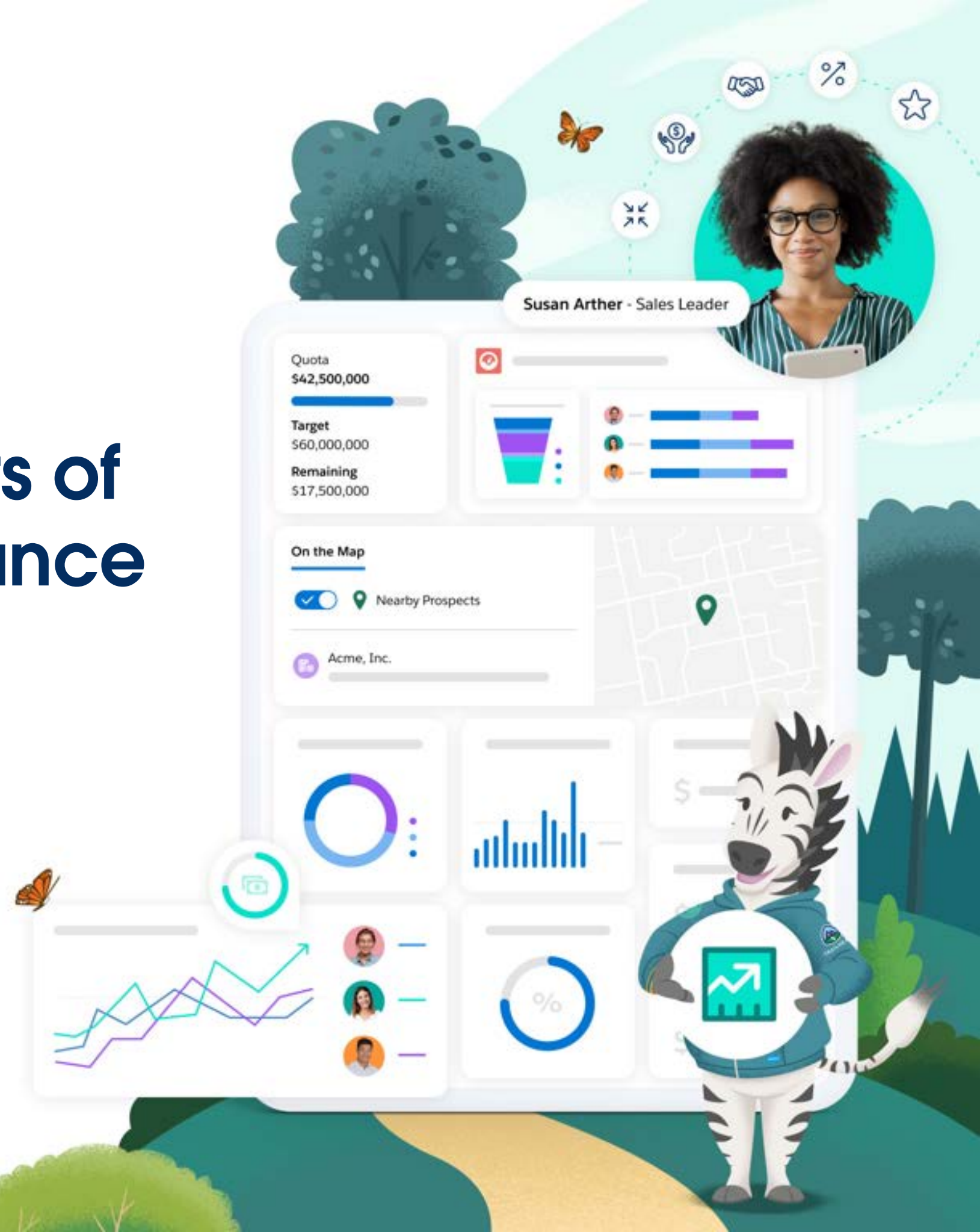




The 5 Key Pillars of Sales Performance Management

Give your sales teams the tools, tactics, and resources they need to sell more effectively – from plan to paycheck.



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Introduction

Sales performance management bridges the gap between sales plans and sales results.

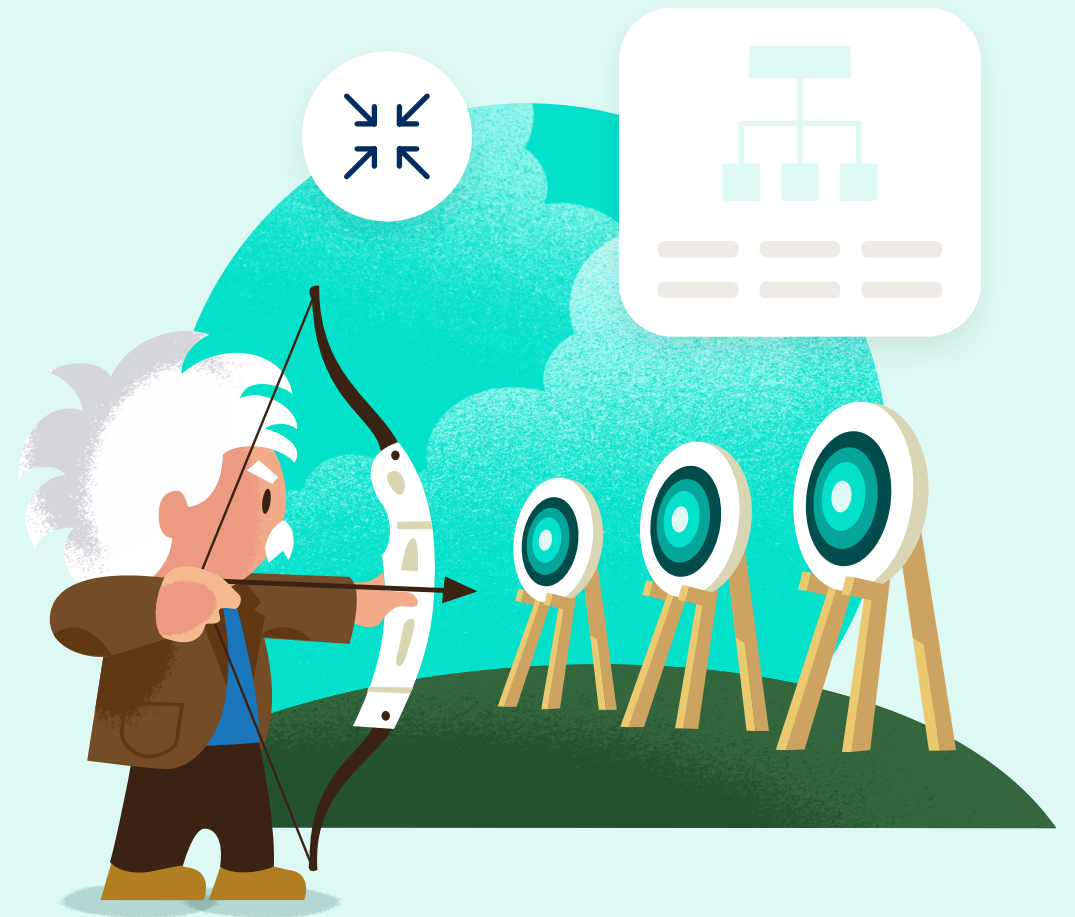
As a sales leader, you know that effective sales performance management (SPM) isn't just setting lofty sales targets and then pushing your team to achieve them. A true SPM strategy requires a systematic, comprehensive approach to selling at scale.

Although SPM strategy varies by company and industry, the most effective sales performance strategies often share the same foundational elements. In this e-book, we'll cover each of these core elements in detail and we offer insight into the specific software designed to power every facet of your SPM strategy, from plan to paycheck.



1

Organizational Alignment Around Shared Goals



01

Organizational Alignment Around Shared Goals

A well-run sales organization is like a well-choreographed ballet. Every player needs to know their part, and more importantly, how their part works in harmony with the others. For sales leaders, this means aligning with other department leaders and crafting sales plans that reflect shared organizational goals.

SPM Solutions for Organizational Alignment:



Sales Planning



Sales Programs



Salesforce Maps



Salesforce Spiff



Alignment isn't just a nice-to-have. When it comes to sales performance management, it's a must-have. Here are a few key reasons:

- 1 **Unified performance metrics:** Alignment ensures that key performance metrics are consistent across departments, allowing for accurate evaluation and comparison of sales performance.
- 2 **Synergistic sales plans and targets:** When aligned with other departments, sales targets are set in harmony with the overall organizational objectives, promoting balanced growth and more effective quota management.
- 3 **Incentive alignment:** Shared goals enable the design of incentive structures that motivate sales reps while aligning with the broader success of the organization.
- 4 **Optimized lead handoff:** Seamless alignment facilitates smoother lead handoffs between departments, reducing drop-offs and enhancing the conversion process.
- 5 **Holistic customer insights:** Collaboration provides a comprehensive view of customer interactions, aiding sales organizations in tailoring their strategies to better serve customer needs.

As the sales landscape becomes increasingly complex and multifaceted, organizational alignment only grows in importance. According to recent research, cross-functional alignment is sales leaders' **#1 tactic for driving growth**.



2

Consistent and Thorough Sales Enablement



02

Consistent and Thorough Sales Enablement

At its core, sales enablement refers to the ongoing process of equipping sales teams with the tools, resources, and training they need to excel. Sales enablement can include everything from product knowledge and selling techniques to onboarding and tech stack training.



Sales enablement, when executed well, carries significant implications for Sales Performance Management. Here are a few ways the right sales enablement strategy can impact your goals and outcomes as a sales organization:

- 1 **Improves sales efficiency:** With the right tools and resources at their disposal, sales professionals are able to streamline their efforts, thus improving the overall efficiency of the sales process.
- 2 **Boosts sales effectiveness:** High-quality training and coaching enhances the skills and competence of a sales team, maximizing the impact of top performers while helping low performers improve and hit their targets.
- 3 **Enhances prospect and customer relationships:** Informed and educated salespeople build stronger relationships with prospects and customers, ultimately driving more wins, customer loyalty, and repeat business.



02

Consistent and Thorough Sales Enablement

Beyond supporting your SPM goals, sales enablement can also help you keep your teams intact and retain top performers. In fact, improving sales training and enablement is one of the [top retention strategies](#) of today's sales leaders.

SPM Solutions for Effective Sales Enablement:



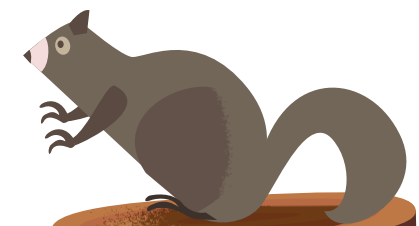
Sales Programs



Salesforce Maps

Here are a few simple steps to help you implement or improve your sales enablement strategy:

- 1 **Equip your team with the right tools:** Consider your tech stack. Think about things like, how your team prospects, how they leverage content and resources, what improvements the sales process needs, and where you find reps getting stuck. Do your sellers have the tools they need to do their jobs? And, just as important, do they know how to use the tools at their disposal?
- 2 **Align sales plans and sales enablement programs:** When you implement or change a sales plan, it's also important to create or tweak enablement programs so that they're tailored to any new goals or targets you expect sellers to hit.
- 3 **Implement a strong feedback system:** Collecting constructive feedback will aid you in identifying areas of improvement and potential growth opportunities. Continue to adjust your enablement strategy and iterate as you get feedback from sales employees.



3

Ongoing Coaching and Professional Development Opportunities



03

Ongoing Coaching and Professional Development Opportunities

Investing in professional development is vital to the success of your SPM strategy. The sales landscape is constantly evolving, with shifting customer expectations, emerging technologies, and new industry trends. Utilizing routine coaching sessions allows your sales team to stay ahead of these changes, equipping them with the skills and knowledge they need to adapt and excel.

SPM Solutions for Ongoing Coaching:



Sales Programs



Agentforce
Sales Coach

Exploring this deeper, investing in the development and growth of your sales team aids in the following ways:

- 1 **Up-to-date selling strategies:** Regular coaching and training ensures your team is always up-to-date on the latest sales methodologies and practices.
- 2 **Job satisfaction:** Employee development promotes individual growth and learning. In turn, this boosts morale and engagement in the workplace while also decreasing sales turnover.
- 3 **Consistency:** Coaching and training opportunities promote consistency across teams, which contributes to a unified brand message and prospect experience.
- 4 **Performance improvement:** Ongoing professional development provides the opportunity to explore areas of weakness and offer targeted training to improve sales performance at scale or on a case-by-case basis.

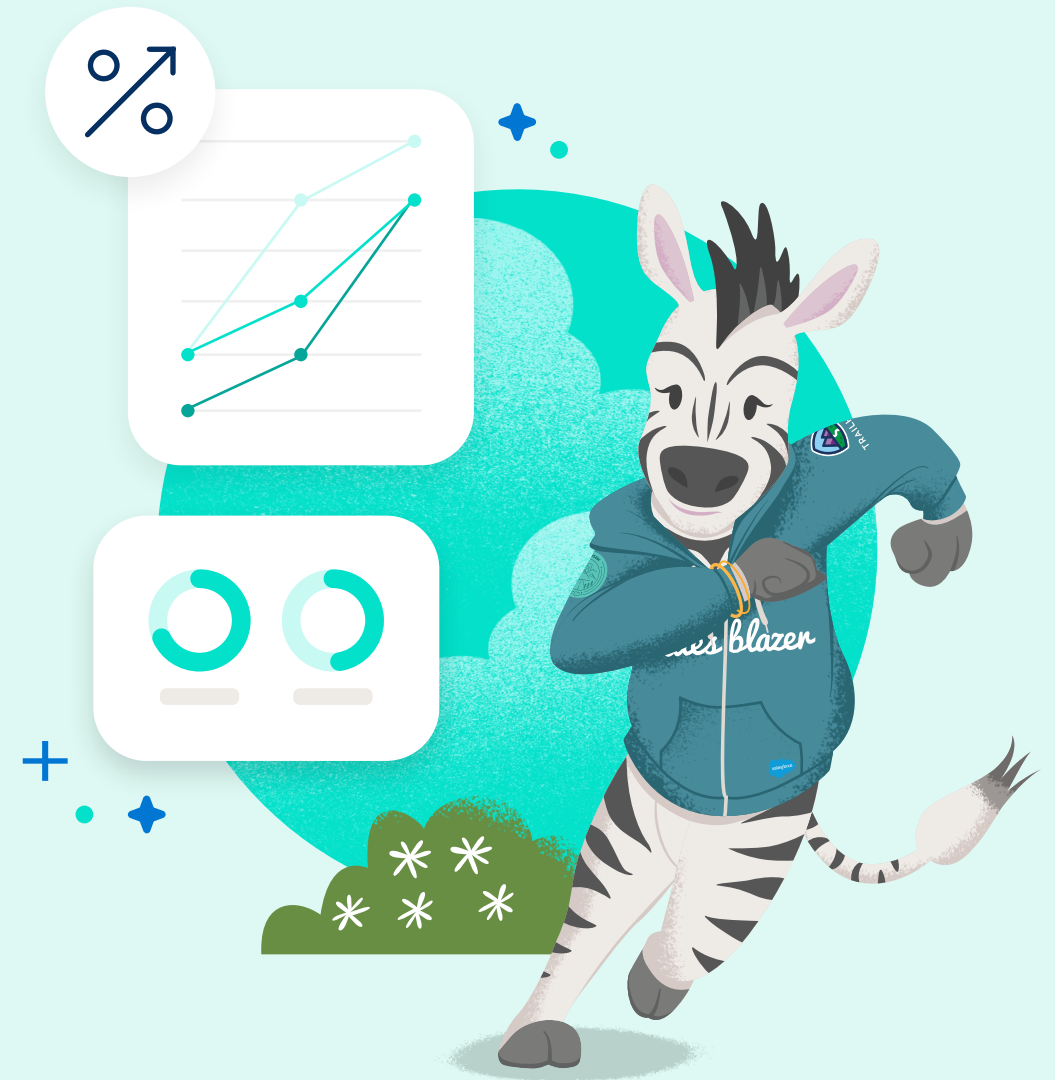
If you don't yet have a formalized coaching or training strategy, start by working with your leadership teams and key stakeholders to conduct an analysis of both team performance and individual performance.

Then, prioritize the issues that are most widespread and costly. From there, build regular coaching, performance reviews, and training blocks into your team's schedule. Remember, the goal is continuous improvement, so make sure to regularly review and adjust your program as necessary.



4

Robust Reporting and Actionable Analytics



04

Robust Reporting and Actionable Analytics

It's no exaggeration to say that without access to comprehensive reporting and sales analytics, sales performance management simply doesn't exist.

SPM Solutions for Robust Reporting:



Sales Planning



Sales Programs



Salesforce Spiff



You need a continuous stream of real-time data in order to assess your team's performance, conduct data-driven sales planning, identify areas of improvement, and double down on the strategies that work well. When this data is readily available, it becomes easy to:

- Spot trends and patterns in your team's behavior.
- Pinpoint opportunities for growth and leadership development.
- Proactively prevent future issues before they have an adverse impact on results.
- Make data-driven decisions regarding big-picture sales strategy.

Here are some of the metrics you should be tracking and reviewing on a regular basis:

- 1 **Pipeline metrics:** Sales forecasting, meetings booked, opportunities created, average deal size, etc.
- 2 **Sales cycle metrics:** Total length of sales cycle, length of time in any given funnel stage, pipeline velocity, conversion rates, win rates, etc.
- 3 **Individual rep performance metrics:** Activity levels, quota attainment, individual conversion rates, follow-up times, number of touch points, etc.
- 4 **Seller experience metrics:** ENPS, sales turnover rate, employee satisfaction, engagement rates, etc.
- 5 **Earnings and incentive program metrics:** Earnings to date, potential earnings, quota attainment, performance in relation to incentive plan changes, etc.

5

Strategic Sales Incentive and Compensation Policy



05

Strategic Sales Incentive and Compensation Policy

A well-structured incentive program can dramatically boost a team's performance – not only driving motivation, but also profoundly impacting morale, engagement, and turnover.

90% of top-performing companies reward sales associates through incentive programs, and these programs can increase employee performance by 44%.

SPM Solutions for Incentive Compensation Management:



Salesforce Spiff

Creating the perfect sales compensation plan isn't easy. It requires careful coordination across departments, alignment around goals, access to data, and more. Here are some key considerations for when you create or adjust your comp plans:

- 1 **Clarity:** Make sure your incentive programs and commission structures are clear and easy to understand. Your teams should know exactly what they need to do in order to be compensated.
- 2 **Alignment:** Your incentives should align with your company's strategic goals and the behaviors required of each team to hit said goals.
- 3 **Competitiveness:** Your compensation plans and commission rates need to be competitive to attract and retain top talent.
- 4 **Visibility:** Sales teams need to be able to see compensation data in real-time in order to understand their potential earnings and stay focused on their goals.

The implementation of your sales incentive program is just as important as its design. Here are some steps to ensure a successful implementation:

- Communicate the details of your program clearly to your sales team.
- Keep track of performance and regularly update your team.
- Deliver rewards promptly to maintain motivation.
- Audit your program regularly to ensure it remains fair and effective.

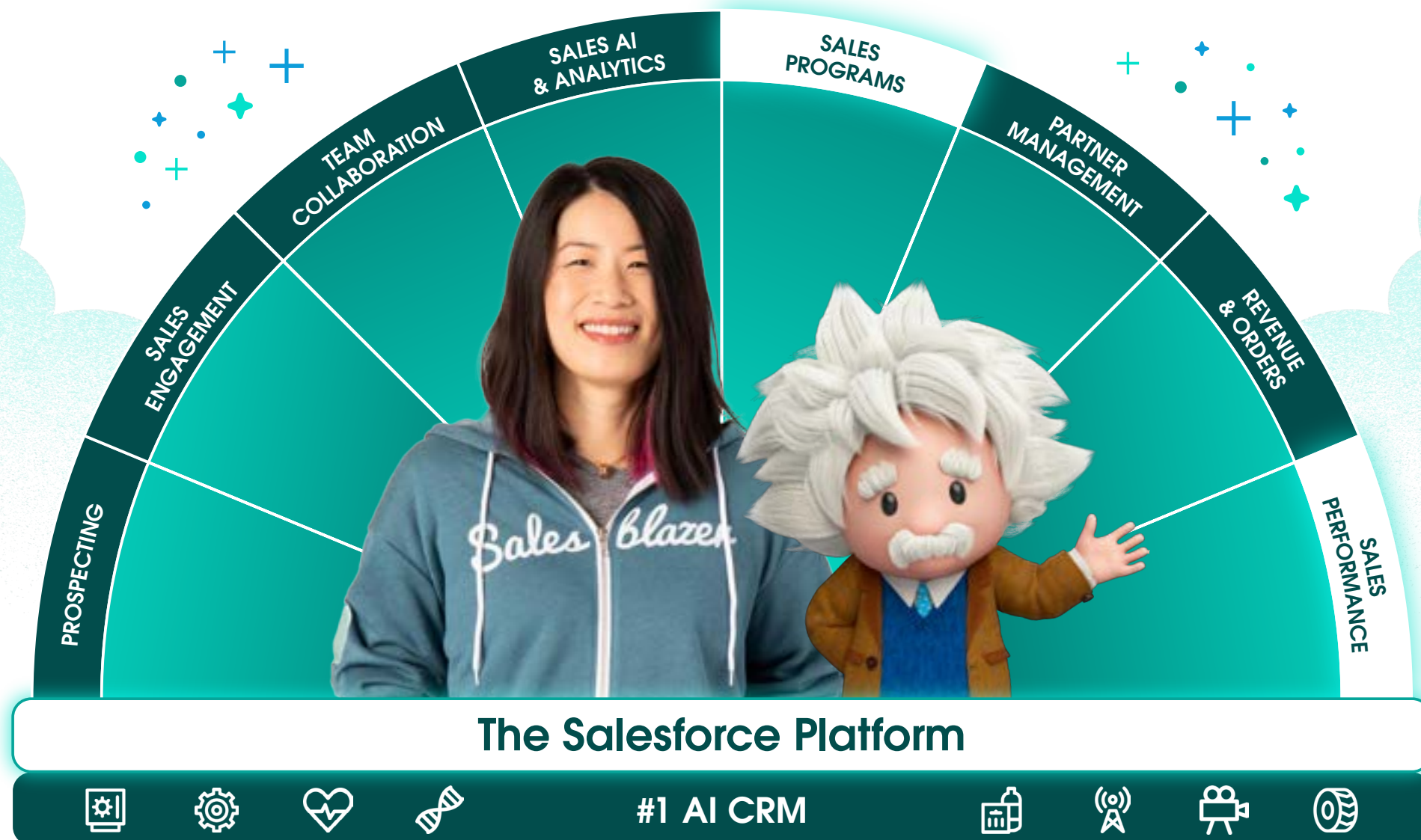
Exploring the Salesforce SPM Suite



Exploring the Salesforce SPM Suite

The tools you need to optimize every step of the sales process, from planning to paycheck.

With the right software, you can kickstart an effective sales performance management strategy or amplify the power of your existing programs. These four solutions will help you transform your SPM strategy and put your sales teams on a path towards success.

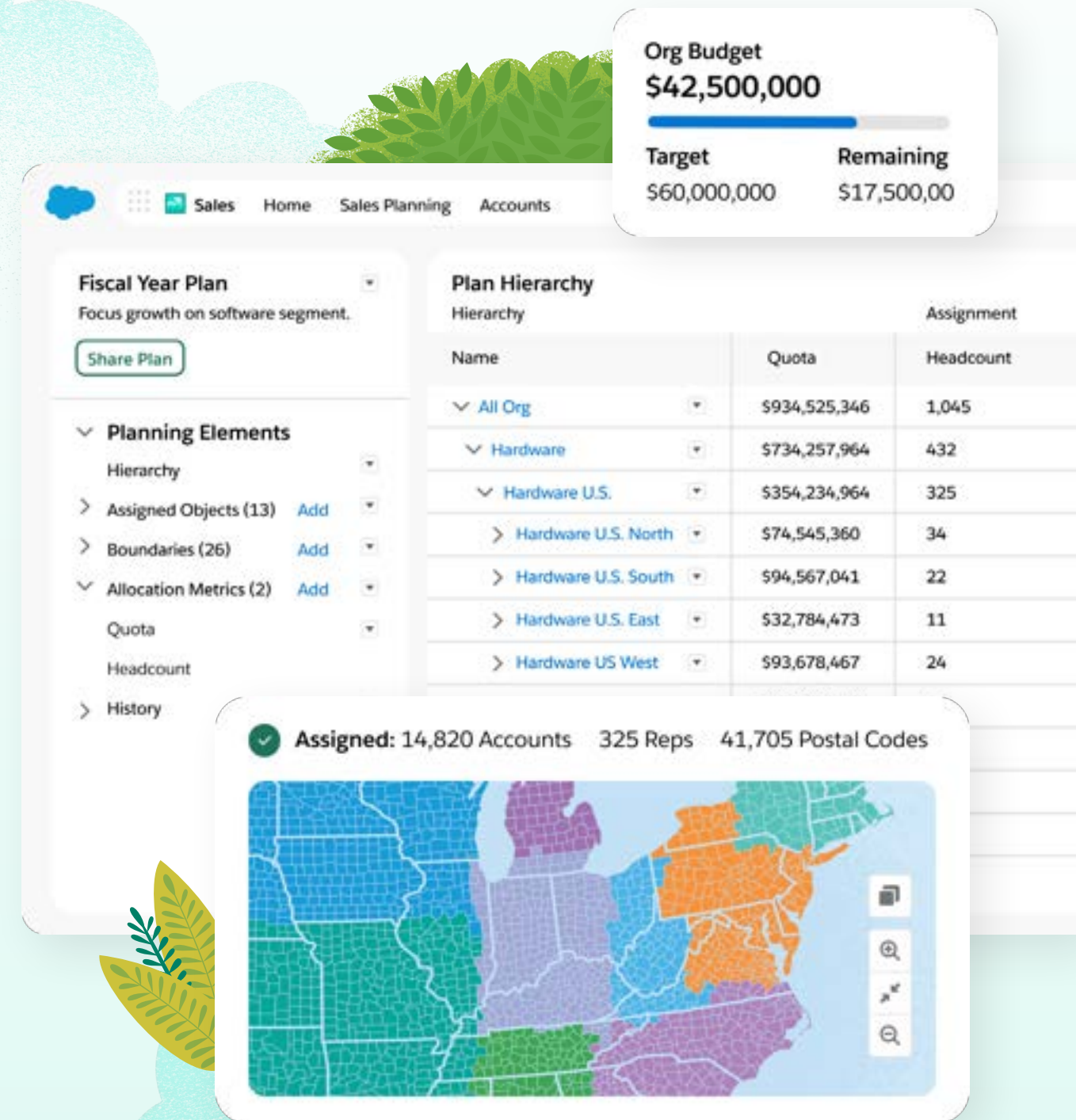




Sales Planning

Accelerate and optimize your sales planning process. Structure plans that reflect your organization's goals, automate data entry, and make changes quickly to keep your sellers on track.

- Build new plans and refine existing plans using rich customer data.
- Manage hierarchies and apply changes based on shifting business priorities.
- Develop map-based territory plans to assess coverage and performance at the team and seller level.
- Distribute quotas and targets to each team and rep with a few simple clicks.
- Visualize team and rep performance in real time to assess the impact and effectiveness of your sales plans.

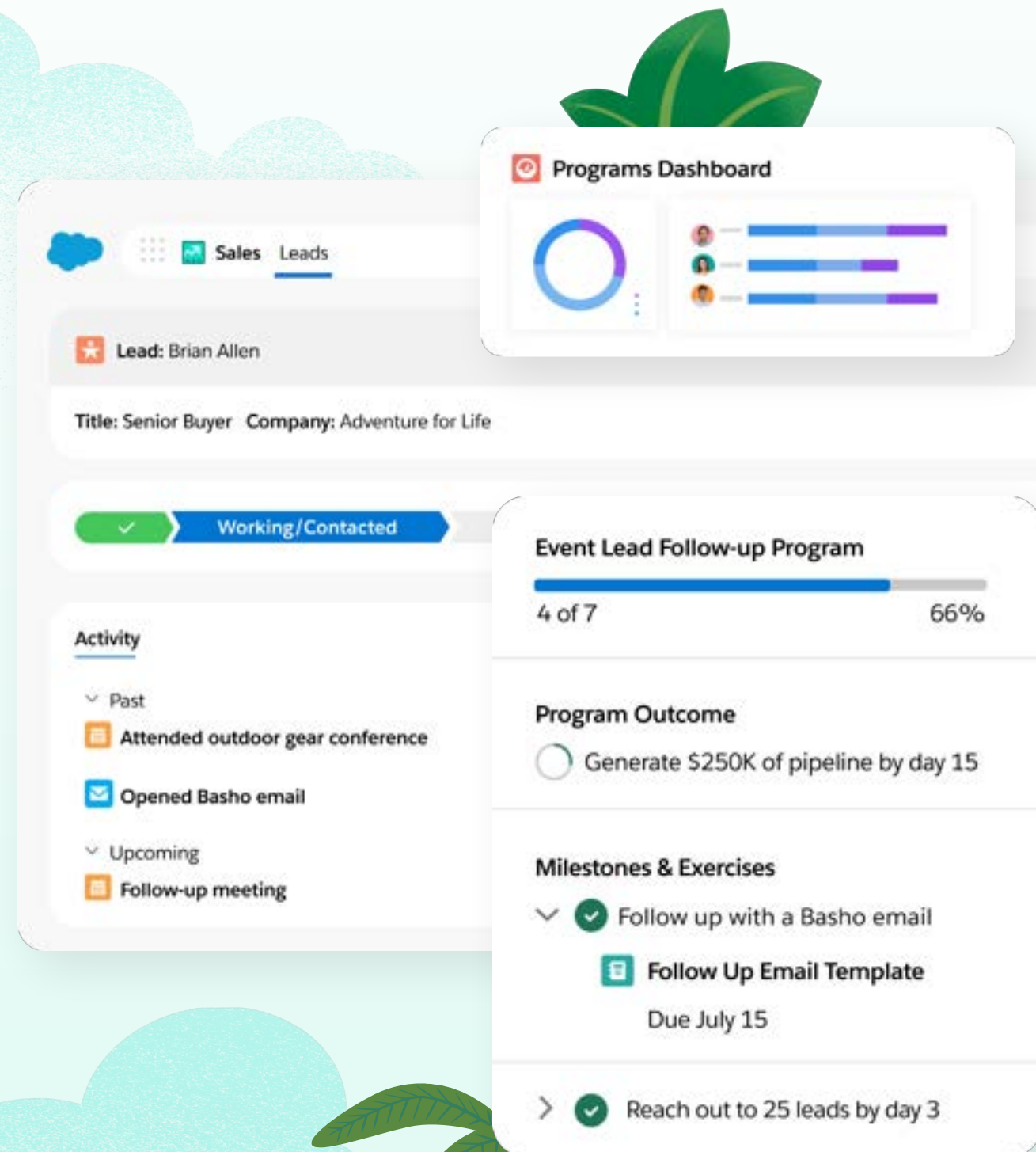
[Learn More](#)



Sales Programs

Deliver AI-powered coaching and personalized resources directly to your sellers' existing workflows. Quickly build and deliver programs that drive performance, with an intuitive no-code builder directly inside of Salesforce.

- Connect programs to the specific targets and KPIs of new and existing sales plans.
- Use out-of-the-box templates or an intuitive builder to create programs fast.
- Deliver programs directly into sellers' flow of work.
- Monitor quota attainment in real-time and easily build programs designed to address under-performance and support continuous improvement.
- Get AI-powered coaching insights informed by rep activity and revenue results.

[Learn More](#)

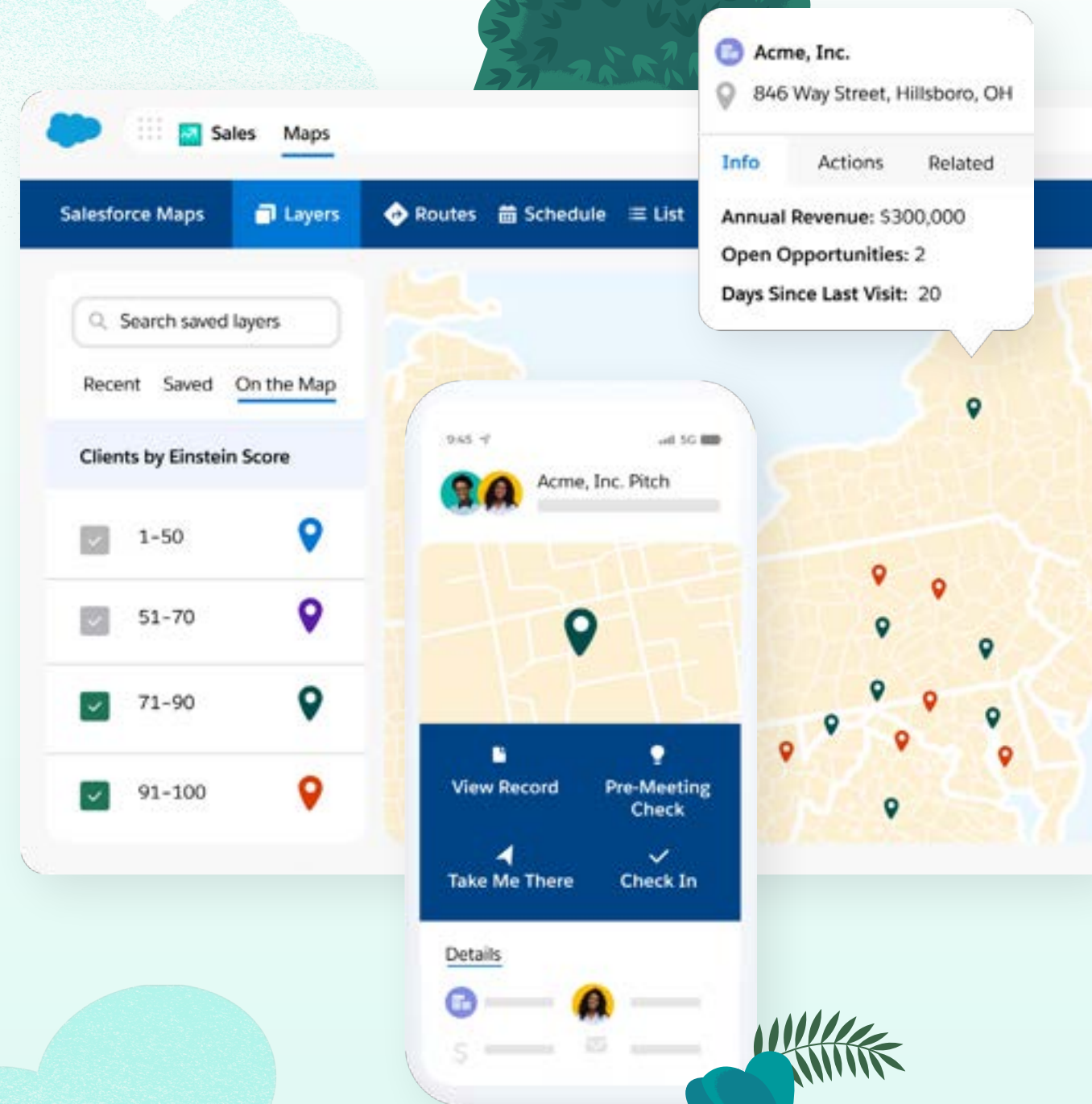


Salesforce Maps

Enable sellers to close deals faster by enhancing your CRM data with location intelligence. Streamline the account planning process and automate record-keeping tasks to help reps maximize their efficiency in the field.

- Visualize relevant customer data within an interactive map enhanced by location intelligence.
- Easily build schedules, adjusting for existing meetings, resource requirements, and even traffic patterns.
- Access Maps on the go, make check-ins, draft account notes, and search for prospects to fill unexpected gaps in their schedules.
- Build team schedules weeks in advance and continuously evaluate field operations performance.

[Learn More](#)





Salesforce Spiff

Build commission plans that scale with intuitive, automated incentive compensation management software. Design, implement and optimize commission plans faster than ever.

- Easily automate commission calculations to reduce administrative overhead.
- Design comp plans that align with your business goals in a matter of days, not weeks or months.
- Leverage machine learning to automatically eliminate errors and create a single source of truth for commission data.
- Update plans with a few simple clicks to support teams as they change and scale.
- Provide sellers with real-time visibility into their current and potential commission earnings, even before a deal is closed.

[Learn More](#)



Account Executive Plan
Amanda Jones Sales

Total Commissions this Period

\$5,078

Commission Tracing

Upsell Commissions
Payout rule name

$\text{UpsellAmount} * 5\% + \text{UpsellAdjustment}$ Acme Collaborative Deal
\$29,733 \$0 = \$1,487

Upsell Amount
Variable name

ACV Acme Collaborative Deal
\$29,733 = \$29,733

Finance Account Executive Plan Designer Calculate

Q1 Account Executive Amanda Jones

plan_assignment statement_period plan rep

Name	start_date	end_date

fx	OpportunityID	APR_cc	Closed Date
fx		USD	

Total Sales QTD

\$67,573

Quota Attain

75



Agentforce Sales Coach

Provide personalized coaching at scale to improve sales reps' ability to navigate difficult conversations and close more deals. Equip sellers with an Agentforce agent that can analyze pitches and calls, deliver tailored feedback, and help reps advance deals.

- Practice pitching, handling objections, and negotiations with realistic role-plays tailored to each deal.
- Receive personalized, objective feedback to bolster seller strengths and improve weaknesses.
- Get stage-specific selling guidance, grounded in a combination of CRM data and generative AI, designed to help reps navigate the sales cycle efficiently.
- Connect coaching to sales results by analyzing win/loss rates of deals with and without AI-powered coaching.

[Learn More](#)



Role Play with Sales Coach



Your Response

I noticed you brought up some pricing concerns in a previous email.

Let's talk about that.

Restart



Sales Coach Response

Yes, thank you for remembering that.



Feedback

Role play complete. Let's review your result.

What went well

Growth opportunities

Next Steps

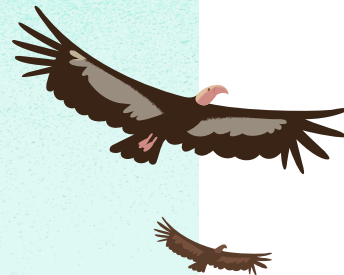
Final Thoughts

The growing complexity of the sales world only emphasizes the importance of a diligent sales performance management strategy. But in order to be effective, you need much more than a few distinct tactics and individual tools.

You need a connected, intelligent platform in which all of your SPM solutions work together to continuously drive sales performance.

With the sales performance management pillars we covered in this e-book, you'll know how to set your sales team up for long-term success. And with Salesforce, you can leverage the power of the world's only fully integrated suite of sales performance management solutions.

These connected solutions, housed within the CRM you already know and trust, will enable you to use your existing data to create the most seamless sales process possible – and enhance every stage of the seller experience, from planning to paycheck.





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