

# Sales Team Hiring Guide





**As a small business owner,** you've always been your company's head of sales — not to mention trouble-shooter, receptionist, light-bulb changer and, oh yeah, founder and owner. But now the company's grown to the point that even you recognize you can't do everything. It's exhilarating — and terrifying. A salesperson is someone you'll rely on not just to expand your customer list and your sales, but to tell your company's story every day.

For a head start on finding just the right person to fill those gigantic shoes, consider the tools and guidance in this helpful guide full of practical tips.

# 7 Things to Look for in a Quality Resume

The resume has been around for more than 500 years — and not even the digital age has lessened the value of this straightforward tool for separating good candidates from bad. For small-business owners, it's the ultimate hiring brief and best place to start your evaluation process.

Sure, there are resume qualities that apply to most any job. For example, resumes that list experience only by year could be hiding gaps of several months between

jobs — possibly signaling someone who has trouble holding positions or who quits when the going gets tough. However, there are elements that apply more specifically to sales.

What can a resume tell you about whether this person has what it takes to become your enthusiastic partner in growing the company? Whether you review the resume on paper or through an online resource such as LinkedIn, these seven qualities can help you determine who to call in for a formal interview.

1

## Meeting and exceeding goals

Success in sales is largely about numbers, and good salespeople will proudly display them on their resume. If they've operated on a monthly quota, how frequently did they exceed that number? If they've had a hand in expanding market share, how and by how much? Did their sales increase over time?

2

## Expanding territories

Look for signs of steady progress toward goals such as larger territories, more prominent roles and new challenges. Have candidates consistently pushed into new verticals? What evidence do you see that they are always thinking about growth and expansion — for themselves and the business?

3

## Awards

Unlike some professions where recognition is more subjective, sales awards are usually tied directly to measurable performance. A candidate who has been recognized for excellence by her company or industry will likely repeat that track record for you.

# 4

## Entrepreneurial flair

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The salesperson you hire will in some ways have to invent his role, helping you develop processes and build a sales structure for the team. Someone who's spent most of his time as a salesperson or manager at a very large company, accustomed to formal procedures, may feel lost in a startup environment. Evidence that he's thrived amid entrepreneurial uncertainties could be a plus.

# 5

## Brevity

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A huge part of sales rests on the ability to catch and hold the attention of customers and prospects. Does the resume move crisply from point to point, covering the highlights in succinct, active prose? Or does it explain ancient experiences and minor accomplishments in exhaustive, jargon-heavy detail? Though not everyone speaks the way they write, a resume that bores you could be a warning that customers will feel the same way in sales meetings.

# 6

## Attention to detail

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The person you hire will soon represent your company and your brand in front of the people who matter most: your potential customers. Typos and grammar errors are a clear red flag. Will candidates who can't be bothered to proofread their own resumes share the fanatic attention to detail that's making your company successful? Is the resume logically prepared, easy to follow and visually appealing?

# 7

## Excitement (yours)

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Of course, you can't tell everything from a resume. But because the purpose of these documents is for the candidate to *sell* you on the idea of a formal interview, ask yourself if this is someone you can't wait to meet. If so, you may be on your way to finding the person who will help you take your sales, and your company, to the next level.

## And one thing you thought mattered (but probably doesn't)

Many job descriptions demand industry experience. Although small business or entrepreneurial experience can be a big plus (see above), intimate knowledge of a particular product or service can be overrated — and demanding it will limit your pool of skilled prospects. The human qualities that make for a great salesperson — energy, passion, ambition, honesty, creativity — travel well from one company to another. It's better to seek a great salesperson and bring them up to speed on your industry.

# The Ultimate Interview Question Guide

## (And the Answers You Want to Hear)

### 5 Questions to Ask on a Phone Screen

You've sifted through a stack of resumes and developed a manageable list of talented prospects. The phone screen is your first opportunity to hear a human voice, get a sense of personality and style, and narrow the field to a few choice candidates you'd like to interview in person. The responses to these questions can tell you a lot:

#### 1. What is your current status — and why are you looking to make a change?

This compels candidates to explain why they are interested in leaving their current job, or why they left the last one. Look for positive, forward-looking answers rather than gripes about the mean boss or unfair conditions at their current job.

#### 2. Why do you want to sell for a small business?

Selling for a young company and a multibillion-dollar enterprise are entirely different prospects, each with distinct advantages and drawbacks. You want someone who particularly relishes the opportunities (and risks) of entrepreneurship — not someone simply looking for just another sales job.

#### 3. What do you love about sales?

This gets to the heart of their motivation and invites them to tell you a story of their passion for selling. Look for someone whose enthusiasm for the profession leaves you inspired. It's a good sign that they'll be able to inspire potential customers with the story of your company and its products.



#### 4. What do you know about our company?

The answer can tell you whether the candidate is serious about the possibility of working for you. Unless you're calling out of the blue, he or she should come to the phone having done some basic research, starting with a thorough reading of your website.

#### 5. Are you open to working mostly on commission?

Or, "How do you feel about frequent travel?" Or, "Would you be happy living in a small town?" Whatever idiosyncrasies the job (or your company) present, use this call to identify deal breakers before going through the trouble of an in-person interview.

## 5 Questions to Ask During In-Person Interviews

Now you're getting close. Here's your chance to dig in on what moves them, how they define success and respond to adversity and whether they'll be a good fit for your company.

### 1. Describe your sales process

Sales is part art, for sure, but any good seller has tried and true processes for producing repeatable results. Candidates should discuss such points as how they generate leads, how they differentiate between leads and *qualified* leads (those with a need for your product and the capital and authority to say "yes"), what techniques they use to close a deal and how they follow up with customers after a sale.

### 2. Sell me this pencil ...

There's nothing like a little sales role-playing to tell you how a candidate thinks on his or her feet, says Lou Caporaletti, Director of Lead Development for

Infusionsoft. "It can be a little awkward, but that's okay. You get a good sense for somebody's selling technique, how effective they are and how well they'll communicate with prospects."

### 3. How do you stay in touch with your customer base?

There's no substitute for face-to-face visits and personal calls. But have they also found effective ways to use email and social media to update clients on industry trends and new offerings and to keep track of their changing needs?

### 4. What single sale are you most proud of?

Was the high point landing a customer everyone said was impossible? Repairing a broken relationship? A sale that came only after months of effort? One that required working closely with a team? Depending on your priorities and your company's culture, this question may help you determine if he or she will be a good fit.



### 5. How do you respond when you lose a sale?

Don't settle for clichés or platitudes. Ask your candidates for a specific example of how they responded to adversity. What did they learn that helped them get better? Were they polite to the prospect in the face of rejection? Are they likely to obsess over each failure, or do they find productive ways to vent, pick up the pieces and move on? Do they maintain that relationship for a future opportunity?

## 5 Questions to Ask References

Yes, references are handpicked by the candidate and unlikely to say anything negative. But that doesn't mean they are a whitewash. Ask for names of customers as well as managers. Beyond confirming work details in the resume, these interviews can offer valuable insights, provided you ask the right questions.

### 1. What was this candidate's strategy for building sales?

As a growing business, you need more than an energetic, personable rule-follower. Did he find new ways to expand his target market and reach out to potential customers — or simply conform to a corporate playbook? How did he build and expand existing customer relationships?

### 2. What makes him or her a great salesperson?

Terrific sales people come in many varieties. Is it her passion for the product? His love of solving people's problems? Persistence is a must, but if phrases such as "bulldog" and "never takes no for an answer" come up first, consider how those qualities will jibe with your culture, your target customers and your brand.

### 3. How did he or she handle customer dissatisfaction?

Even the best salespeople sometimes face angry customers. Knowing how the candidate has handled these situations in the past offers a window on how she'll represent your company in a tough spot. Ask for a specific case. Did she accept responsibility and go out of her way to rectify the situation, even at cost

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to herself? The answer may reveal whether she's interested in building long-term relationships or just focused on next month's numbers.

### 4. How did the candidate work with others?

Sales is a competitive profession that attracts people who are out to show the world they're the best. That's great, but a focus on self over team may be best suited to a large company where the products and strategies are dictated from on high. As a small business, you need someone who will not only be driven to succeed but who will also help you craft a sales strategy and have a deep interest in communicating that vision to others in your company.

### 5. Would you hire/work with/buy from this person again?

This is a good way to end the conversation, compelling a personal reaction that they may not have been expecting. Since the candidate supplied the reference, you're unlikely to hear, "No way!" Still, the difference between a hearty "I'd do anything to get him back" and a hesitant "Well ... sure" speaks volumes.

# Sales Team Playbook: How to Attract and Retain Top-Notch Sales People

OK — so now you’ve identified the salesperson or small team capable of taking your company to the next level. Congratulations! These are the people who will put your strategy into action, helping existing customers and prospects understand why they need your products in their lives.

Now, it’s time to concentrate on helping your sales team shine, making them great and keeping them happy. That includes structuring the right pay strategy, giving them the proper tools and making sure your new hires leap out of the gate with a terrific first year.

## How to Pay Your New Sales Team

In an imperfect world there may be no such thing as the perfect formula for paying your new sales team. But the one that comes closest will keep them motivated to work hard and grow with your business, while still offering a bit of security during the inevitable times when the salesperson hits a dry spell or the market suffers.

### Put it in writing

Among the attractions of working for a small business are flexibility, informality and a *we’re-all-in-this-together* sense of trust. So it may be tempting to outline your sales compensation policies in a quick conversation with potential hires and assume all is understood. But that’s a recipe for misunderstandings that could destroy the relationship.

Instead, craft a formal written document that you review carefully with any salesperson you bring on board. This should include:

- ✓ Your company’s overall mission and goals (borrowed from your business game plan). Sales isn’t just moving units — it’s an extension of who and what you are as a company.
- ✓ How he or she will be paid, whether the emphasis is on commission or salary.
- ✓ How you’ll measure his or her performance.

### Salary or commission?

A happy, motivated sales force means striking the proper balance between **base salary** and **commission**.

- ✓ A pay model based on **salary** offers predictable, reliable income and may create a loyal, stable staff — but complacency is the enemy.
- ✓ Commissions offer the upside of higher income for ambitious sellers — but could leave them fretting over rent if they hit a dry spell.

While there’s no preset formula, “a good rule of thumb for a smaller business is to be heavier on commissions and lower on the salary,” says Lou Caporaletti, Director of Lead Development for Infusionsoft. “Small businesses often have less capital to spend on salaries.” Just as important, he adds, “Good salespeople really thrive in an environment where they can in essence create their own paycheck. I’d be wary

of hiring any salesperson who wanted to be paid mainly in salary.”

You might consider a formula of, say, 30 percent of their compensation coming from salary (enough to offer a modicum of reliability) with the remaining 70 percent from commissions based on a percentage of sales.

Say you settle on a commission level of 10 percent of sales. To keep them striving for growth, set a policy that sellers receive the full 10 percent only if they reach whatever sales quota you set for them, Caporaletti suggests. You might bump commissions on sales above the quota to 15 percent or 20 percent. “They’ll really work hard to beat quota,” he says. By the same token, work in a penalty for sellers who *fail* to reach quota.

How do you set that quota? Glad you asked.

## Emphasize commissions over salary

The compensation formula for smaller businesses might look something like this:



### Measuring performance

It’s not enough to unleash your new sales team with a pep talk and the admonition to “go out and sell!”

Establishing the right sales quotas for your company involves as much art as science, especially when you’re hiring salespeople for the first time.

- ✓ Set the bar too low and your salespeople may take their foot off the pedal.
- ✓ Set the bar too high and you may engender resentment when a talented salesperson comes up short.

The best way to determine workable quotas is to closely examine your own record over the past few years. “Chances are, you’ve got a pretty consistent level of sales,” Caporaletti says. Beyond sales, think about how many leads you’ve been contacting each week and how many new ones you generate. Consider your sales cycle (i.e., how long it typically takes between initial contact and closing the sales.) By quantifying these points, you’ll be better able to set ambitious but realistic goals for your staff.





## 7 Tools and Tips to Help Your Sales Team Succeed

Just as your products are only as good as the parts or ingredients you put into them, your sales staff is only as effective as the resources you provide. Giving them clear guidance, instilling them with the passion of your company, and offering tools, resources and best practices helps make their challenging job more certain of success. Consider adding these potent weapons to your team's arsenal.

### 1. Customer relationship management

Any good salesperson knows that collecting and organizing customer and prospect data is the best way to prioritize leads,

schedule follow-ups and build relationships. But it's also time-consuming for sales staffers who need to be out in the field in order to be effective. Investing in topline customer relationship management (CRM) software such as Infusionsoft's CRM for Small Business can automatically:

- ✓ Collect data about leads' behavior
- ✓ Score leads based on those most ready to buy
- ✓ Track appointments and needed follow-ups
- ✓ Help your sales staff better understand and address customer needs

### 2. Marketing automation

The only lead guaranteed *not* to bear fruit is the one you or your sales team fails to follow up on. But creating personalized messages by hand can eat up a salesperson's entire day. A good marketing automation system can help you maximize customer engagement by creating personalized communications based on email sends, opens, clicks, and the like. Systems such as Infusionsoft's Campaign Builder enable you to customize approaches to meet highly specific marketing goals.

### 3. Streamlined processes

Any professional job has its share of administrative processes, and sales is no exception. But your sales team is happiest (and most effective) when they're out doing what they love to do: engaging customers and prospects.

Automating your processes can help them do just that. Consider a software system such that enables you to seamlessly create, manage and email customized quotes and proposals to prospects, which they can click on to accept — thus saving your sales team valuable time.

### 4. Demos and materials

Demonstration is a key to sales — the difference between telling someone why your product is great and *showing* them why they absolutely must have it. Depending on the nature of your products or services, make sure your sales team has the best demo models, online presentations and slide shows to highlight the advantages of buying from your company. And, since your business may change

frequently, be sure to keep these materials up to date. Sending sales reps out with outdated models and specs makes them look unprofessional.

### 5. Content

In the internet age, studies show that the vast majority of customers and clients research on their own before making the decision to buy. Content in the form of articles, checklists or videos that you post on your site or make available through social media or other channels can help establish awareness of your brand. As distinct from advertising, content is aimed not at direct selling but at building trust and reputation. The more comfort people have with your brand, the easier it will be for your sales team to close deals.

### 6. Updates and team-building

Though sales is a profession for individual achievers, you can help your sellers get better by fostering a sense of teamwork and encouraging the sharing of best practices. Make sure

that your sales people interact regularly with others on your staff to help them soak up the culture. And be sure to invest in training update programs that introduce your team to the latest technology, or further develop their professional skills. This will pay off in the long run, not just by making them better salespeople — but by building loyalty in your company by communicating that you are interested in seeing them grow and succeed.

### 7. Celebrating success

What drives a first-rate sales team? Money, of course, but also recognition. You can reward productive sellers and also instill healthy competition on your team by calling out sales leaders with monthly or quarterly awards. Hold an annual dinner or barbecue to formalize the awards. And spread them around — note improvement as well as top performers. You'll encourage your best members to strive further, and your weaker ones to improve.

## A First Year Roadmap for Your Sales Rep

Hiring a salesperson is an investment in your own future. Make the most of it by giving that person a clear path to success starting immediately and continuing through that crucial honeymoon year.

### Upfront training

Let's be clear what we mean by training. If you need to train them

*how to sell*, you may have hired the wrong person, Caporaletti notes. "A small business needs an A-player who can take over your sales and teach others you hire." But *do* take the time to educate them on the nuances of your product. A salesperson who hems and haws about key aspects of your product or services will instill a similar lack of faith in your

customers about your quality and attention to detail. Before you set them loose, ask them tough, specific questions and gauge their answers to make sure they're ready for prime time.

### Solid leads

Nothing frustrates a sales person more than expending creative energy attempting to sell to a

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prospect who has no intention of buying, no matter what. Shortly after hiring your first sales person, you may even want to hire a “lead qualifier,” Caporaletti suggests. This can be a younger, more junior employee who spends his or her days vetting leads to make sure your sales teams spends its valuable time on the most promising prospects.

### **Set incremental goals**

By the time you bring a sales rep on, you should already have mapped out a quota for the year ahead that you expect him or her to attain. But don't expect it to happen all at once. You might divide the yearly target into quarters. Create a smaller (but still measurable) goal for the first quarter, leaving room for training and getting comfortable with the processes. You might tie performance to pay, Caporaletti suggests, by promising them they'll be bumped up to a higher commission rate if they achieve first-year targets.

### **The room to succeed**

This tip doesn't require much from you except a commitment to strategically know when to back off — and that may be the toughest thing of all. After all, nobody knows the company, products, or customers better than you do, and you will feel tempted to manage your salespeople's every move and monitor their relationships. But there's a difference between staying aware and micromanaging. Give them tools, guidance and goals, and then follow up to assess their results. But don't hover.

### **Quarterly reviews**

Reviews are a great idea for any sales rep — but for those who are new, don't wait until the end of the year. Meet each quarter. You'll be able to spot small problems and course-correct before they become big problems, Caporaletti says. Note the successes, making clear what they've added to the company. And note areas where you see room for improvement

— measured wherever possible against the goals you established when they arrived. The experience is still fresh enough that you can encourage change and growth in areas where they need improvement— and they may have valuable insights to help the company get better.

### **The road forward**

With a year under their belt, your sales rep is ready to surge into a new year as a seasoned veteran. He or she knows your processes and products inside and out and owns a contact list of valuable customers and prospects. It's easy to get busy and overlook goals for the new year until you're well into the first quarter. Don't. Now's the time to set clear, ambitious goals for the year ahead.

## Thanks for spending this time with us!

We hope you've found this information useful as you consider ways to strengthen your company's sales and market position. As entrepreneurs ourselves, we understand the demands, pressures and exhilaration of running your business — and why you wouldn't do anything else for a living. We also know that sharing your vision with others, trusting them to live your dream and speak for your company when you're not in the room may be the toughest task of all.

Like any new venture, hiring salespeople can seem mystifying at first. But we believe the steps we've outlined offer a clear, straightforward path to identifying, hiring and nurturing the people you need to make a great company even better.



Infusionsoft is the leading sales and marketing software built for small businesses. Our software, services and educational content help small businesses get organized, grow sales and save time. By combining sales and marketing tools in one system, we help entrepreneurs save time and simplify operations.

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