MARK 7379-01
Sales Leadership
Mondays 6:00-9:00PM

Professor:	Carl Herman
Office	MH 398
Office Hours	M 4:00-5:30 pm and by appointment
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Required Course Materials

- Harvard Case Packet, Harvard Business On-Line
  - Link to Harvard Course Materials:
  - [Harvard Course Pack](#)
- Selected Readings – Blackboard
- *Cracking the Sales Management Code,* Jason Jordan

Course Objectives:

1) Understand the personal selling process, the dynamic nature of strategic sales management and the resultant effects on an organization and its customers.

2) Understand the basic framework of different sales organization types, as well as diverse staffing and sales training strategies.

3) Understand the role of leadership in motivating a sales force.

4) Analyze and understand the pros and cons of various sales compensation and expense systems.

5) Understand the fundamental role of sales planning including forecasting, budgeting and sales territory management.

6) Comprehend how to evaluate individual and organization sales performance including the analysis of sales volume, cost and profitability.

Assignments and Classwork

Case Presentations:

- Each team will be assigned a case or sub-case that will be formally presented/discussed in class on the date indicated below..
    - *__Submit the Powerpoint on Blackboard prior to the class discussion.__*
- **Everyone is expected to read the cases before the class discussion.** These are interesting and relevant cases. A vibrant class discussion to learn everything the case contains requires participation from everyone. A large part of your participation grade will be based on your engagement in this discussion.

Team Topic Presentations:

- Most weeks there will be a primary topic of discussion. Student teams will lead this discussion. Each team will prepare a presentation that teaches the rest of the class the important and relevant information from the assigned chapters. This requires analysis by the team, not just a sequential paragraph by paragraph summary of the chapters. Use your assigned chapters to teach the class what they need to know to be great sales managers. Teams should also include relevant information from the reading material and Case studies. Plan on a presentation including Q&A that takes no more than one hour.

Forecasting Assignment:

- Understanding the art and science of forecasting sales performance is a critical component of the sales manager's job. We will use a real world database of accounts and sales opportunities to forecast sales for this semester.
- Each team will create a preliminary and final forecast for each of the 4 SEI sales teams. Submit each forecast, with credible justification and rationale on the date indicated in the schedule.
- This exercise will provide insight into the challenges of accurately forecasting sales and into the value of a good CRM system, processes and database to develop the forecast.
- 6 points is based on average forecast accuracy and 9 points on forecast process.
    - For Forecast accuracy:
    - +/- 5% - 6 Points
    - +/- 10% - 4 Points
    - +/- 25% - 2 Points
    - >25% - 0 points
- Forecast should be based on analysis of Quota, Number of Sales Weeks, Number of Reps, etc. Historical analysis should be in context.

Hiring Draft:

- On a date to be announced each team will submit a list of 5 potential candidates from the PES Sales Management class for a sales position. This list will be developed by analyzing a resume database available on Salesforce.com.
- Each team will interview these 5 candidates and hire 3 for the team's fantasy company.
- Each team will submit a report that includes:
    - the selected candidates
    - the reason that candidate was selected
    - the list of interviewed candidates and why those candidates were selected from the resume database
- Grades will be based on the 3 new hires' actual performance during the Sales Career Fair sales project and the quality of the submitted report.
    - Each new hire makes quota – 10 Points
    - One new hire does not make quota – 7 points
    - Two new hires do not make quote - 3 points
    - None of the new hires make quota – 0 Points
    - Performance over quota - 1 bonus point for every 100% over quota for the combined team
    - Winning team – 2 bonus points
    - Written hiring report – 5 points

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Sales Manager Interview:

- Your team will interview 4 different sales managers selected in consultation with me.
    - The only criteria is that the people you interview must be full time sales managers that manage at least 4 full time salespeople. (The interviewee cannot have a personal quota)
- There is an interview guide that is just that, a guide to help you structure your interviews
- The interviews should discuss topics such as:
    - The interviewee's organization
    - Salespeople's attitudes
    - Hiring Process
    - Training
    - The Sales Process
    - Technology use
    - Challenges in motivating salespeople
    - How incentive pay is structured and how well it works
    - Differences in managing sales people versus other functions in a company
    - The impact of the sales organization on customer relationships, retention and loyalty
- **The goal of your research is to paint a picture of life as a sales manager for the companies you choose. You should highlight the differences in the role from one company to another and one industry to another.**
- During the scheduled class period, each team will deliver a powerpoint, or similar application, presentation that discusses the results and conclusions from these interviews.
- Submit the presentation on Blackboard prior to the end of the semester.

- The focus of this project is a comprehensive understanding of the sales manager's role. Specific areas of interest are relationships with reps and customers, hiring, training, developing, motivating and measuring sales people.

Salesforce.com

- One benefit, challenge and opportunity in this class is your Salesforce.com license. You will use Salesforce.com for the Hiring and Forecasting assignments. For those of you who have not used Salesforce I suggest you take the online training Trailmix you will find here: [U of H Sales Program Trailmix](#)

Learning Style

The methods of learning in this course require advance preparation by the students. We will work together to present, discover and share ideas in order to learn more about the issues related to selling products and services and managing ongoing customer relationships. I believe that a variety of pedagogical techniques maximize what we all get from the class. Therefore, the course will use case discussion, lecture, facilitator and student-led discussion, a field project, a research project, Socratic dialogue, (possibly) a field trip, and student presentations to expose key learnings.

Daily Routine

For most days, I expect class meetings to follow this type of routine:
- Lecture/discussion/guest speaker/video/group exercises, etc. focusing on the key topic(s) of the day (40-50 minutes)
- Case discussion or Sales Role Play – 75-90 Minutes
- Break (15-20 minutes)
- Student led discussion around research or field project (30 minutes)

Class Participation

An effective class session can only occur if you, your classmates, and I are involved in the learning process. This requires detailed advance preparation from all of us. I expect everyone to be prepared for each class. This course is designed such that we will learn from each other. That means that when we discuss Breaking the Sales Management Code or any of the Cases I expect you to have prepared to be a part of the discussion whether your team is presenting the topic or not. A significant part of your participation grade is based on this preparation and class engagement.

Class and case discussions are enhanced by a free and open exchange of ideas. We learn from each other by building off other people's comments and by disagreeing with other people. You should be prepared to defend a position that you take and you should expect others to defend their positions. I encourage you to challenge ideas with which you disagree—remember to *challenge the idea and not the person*. Furthermore, you should expect to be challenged by others—who

disagree with your ideas, not you. By defending your ideas you will learn, but you should also be willing to change your mind. Changing your mind is also a sign of strength. Be aware that for many issues there is no one right answer. I also want to encourage you to be creative in your ideas and show a willingness to take chances.

Class participation is a critical component of my evaluation of your performance in the class. Participation is based on quality, but some level of quantity is also necessary. Quality participation moves the discussion along and contributes to our collective learning.

Attendance Policy

Attendance is expected—in my classes we all learn from each other and your absence will prevent us from learning from you and you learning from us. As noted in the previous section, being absent from class has a significant negative effect on your class participation.

SFA and Communications

You will all be given a Salesforce.com account to use during the class. This will be an educational opportunity to learn how to use a key component of sales force automation and CRM – and see the cost and benefit to the rep of using it. You will use Salesforce extensively for the Forecasting and the Recruiting/Interviewing assignments.

Grades

I expect that by this time in your graduate education that you are intrinsically motivated. I also expect that you are taking this course because you genuinely want to learn more about sales and sales management. Therefore, I do not require any exams in this class.

On the other hand, I believe that we all tend to do what is evaluated and rewarded. I am very interested in learning from you and I think that your colleagues share this interest. If you choose to not actively participate in the class you deny us the ability to learn from your wisdom and experience. To assure that you give as much to the class as you hope to receive from it, I rely on grades (besides the school requires them). I expect to base your grades on the following proportions:

Class participation	25%
Team Topic Presentation	15%
Hiring Project	15%
Forecasting Assignment	15%
Sales Manager Interview	15%
Case Presentation	15%

Tentative Schedule – Meaning it will change

Date	Case or Lecture	Weekly Team Topics	Forecast	Hiring Project	Sales Manager Interview
Jan 14	Course objectives/ Overview Selling and the Sales Process		*Salesforce Login Student Data Sheets*	*Discuss Hiring Project*	
Jan 28		Chung and Narayandus- Team 1	*Salesforce overview. Discuss Forecast*	*Using CRM to find candidates. How to Interview*	
Feb 4	***The Role of a Sales Leader*** *Step Smart - Team 5*	Marshall and Moncrief: Team 2		***Candidate List Due***	
Feb 11	*Net-App Team 6*	Jordan Ch1-3 Team 3	***Preliminary Forecasts Due***		
Feb 18	***David Vinzant***	Jordan Ch4-5 Team 4			Discuss Sales Manager Interviews
Feb 25	*The Army Crew Team Team 1*	Jordan Ch 6-7 Team 5		***New Hires Due***	
Mar 4	*Building Relationships - CH*	Jordan Ch 8-9 Team 6			
Mar 11	**SPRING BREAK**				
Mar 18	*Hubspot Team 2*	***Coaching*** *for skills and strategy. Coaching for Performance Mgmt - CH*			
Mar 25	*New Science Team 3*	Sales Compensation - CH	Golf Tournament Final Forecast		
Apr 1	***Bryan Bentley***		*Career Fair Final Forecast*		*Life as a Sales Manager Team 6*
Apr 8		Hiring Presentations 1,2,4			*Life as a Sales Manager Team 5*
Apr 15	*Wendy Peterson Team 4*	Hiring Presentations 1,2,4	*Career Fair Debrief*		*Life as a Sales Manager Team 4*
Apr 22		Hiring Presentation 3,5,6	*Key Account Final Forecast*		*Life as a Sales Manager Team 2 & 3*
April 29					*Life as a Sales Manager Team 1*