

Payroll Sales Management Leadership Workshop

Syllabus

Curriculum includes 2 days, 4 hours live training each day.

Sessions include:

Class 1 – Expectations of Sales Teams By The Numbers

- Realistic expectations and forecasting based on your current situations (A new payroll company will have different expectations than a more established company with some market penetration)
- Defining expectation to rep(s) to get them on board with meeting them
- Utilization of expectations in your recruiting effort
- It's all a numbers game! Develop a roadmap for your sales team to show them how to reach objectives

Class 2 - Awareness -Setting and Managing Expectations

- Defining Effective Priorities for your sales rep(s)
- Tactical Mapping: Defining Priorities, Strategies & Resources to Achieve Business & Sales Objectives
- Understanding and managing individual reps based on their personality style

Class 3 – Marketing – Tools Needed to Support Sales effort

- What marketing you should have in place to support the sales effort
- Improving your companies' ability to form referral relationships
 - CPA's
 - Insurance Agent/Brokers
 - Networking
 - Existing Clients

Class 4 - Action Planning & Utilizing CRM

- Training your sales team how to schedule their activity to meet their sales goals
- Participants will learn how to utilize a point system to track their sales teams results and success
- The importance and utilization of CRM