HOW DO YOUR SALES TEAM PRODUCTIVITY BENCHMARKS COMPARE?
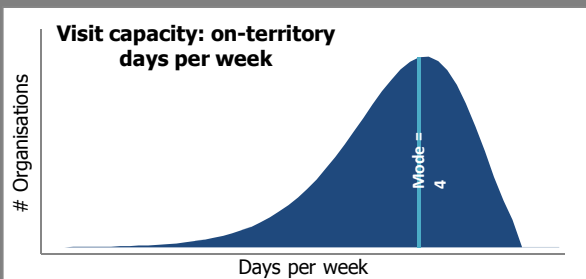
The sales team "law of gravity" - click each component to view its benchmarks

| RESOURCE LEVEL	**X**	VISIT CAPACITY	**=**	CUSTOMER COVERAGE	**+**	PROSPECT PENETRATION

$$\sum \left[\begin{array}{c} \text{\# heads (each role)} \\ \text{x} \\ \text{\% dedicated to sales} \end{array} \right] \quad X \quad \begin{array}{c} \text{ave days pw on territory} \\ \text{x} \\ \text{ave visits pd on territory} \end{array} \quad = \quad \sum \left[\begin{array}{c} \text{\# customers (each class)} \\ \text{x} \\ \text{min visit freq per class} \end{array} \right] \quad + \quad \begin{array}{c} \text{\# target prospects} \\ \text{x} \\ \text{ave visits to convert/recycle} \end{array}$$

VISIT CAPACITY

Visit capacity: on-territory days per week

Organisations — Days per week — Mode = 4

Enter your current average on-territory days per week

Enter your target average on-territory days per week per sales executive

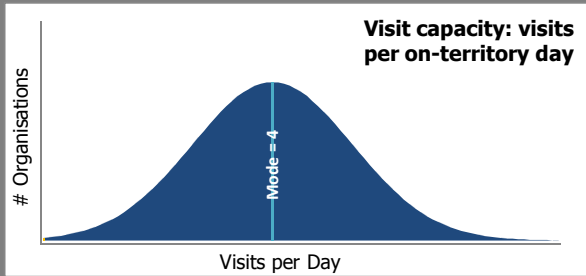**Visit: drive time ratio**

Organisations — Visits per Day — Mode = 2.5:1
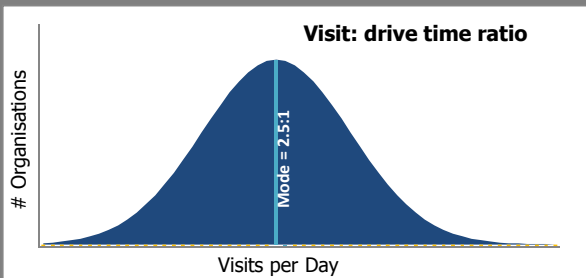
Enter average visit

Enter average drive time between visits (mins)

Ratio (visit/drive)

B2B cross-industry best practice range is 2.5:1 - 3.5:1

Improvement factor

Visit capacity: visits per on-territory day

Organisations — Visits per Day — Mode = 4

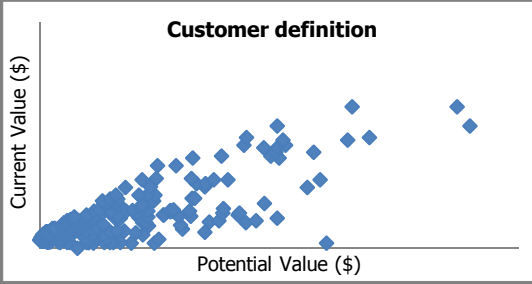Enter your current average visits per on-territory day per

Enter your target average visits per on-territory day per sales executive

Current 'as is' average weekly visit activity rate per

Target average weekly visit activity rate per sales exec

Improvement factor

Customer definition

Current Value ($)

Potential Value ($)

Do you apply both a Current Value and a Potential Value score to each customer to
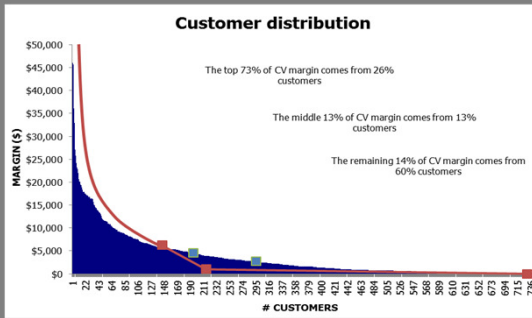
Current Value (yes/no)

Potential Value (yes/no)

Improvement factor

Do you apply both cost of sales and cost to serve values systemically to calculate the breakeven point of baseline account management? (yes/no)

Improvement factor

Customer distribution

$50,000
$45,000
$40,000
$35,000
$30,000
$25,000
$20,000
$15,000
$10,000
$5,000
$0

MARGIN ($)

CUSTOMERS

The top 73% of CV margin comes from 26% customers

The middle 13% of CV margin comes from 13% customers

The remaining 14% of CV margin comes from 60% customers

Do you systemically currently segment & classify your total customer base for tiered account management & visit targeting in a uniform & consistently implemented way? (yes/no/ partly)

Do you have a systemic account management process and toolkit that could be audited by observing the way top tier customer visits
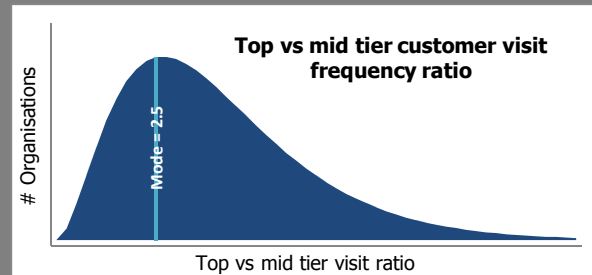
(yes/no/ partly)

Improvement factor

Top customer tier population as a % of the entire customer base

Organisations

Mode = 20%
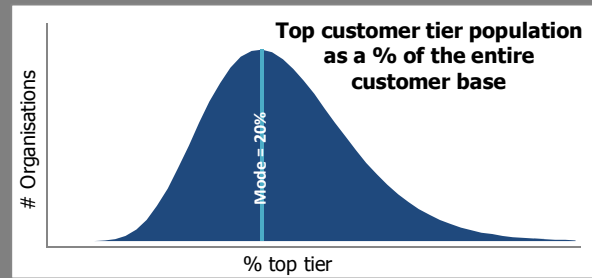
% top tier

Enter the % of your entire customer base that is systemically classed as top tier
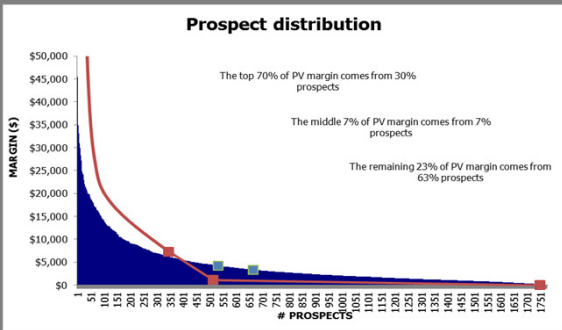
B2B cross-industry best practice range is 25% - 35%

Improvement factor

Top vs mid tier customer visit frequency ratio

Organisations

Mode = 2.5

Top vs mid tier visit ratio

Enter the system's ratio of the top tier visit frequency to the

B2B cross-industry best practice range is 2:1 - 3:1

e.g. if your top tier customers are visited monthly and mid tier customers quarterly, the ratio would be 12/4 = 3

Improvement factor

Weighted Customer Coverage improvement factor

PROSPECT PENETRATION

Prospect distribution

The top 70% of PV margin comes from 30% prospects

The middle 7% of PV margin comes from 7% prospects

The remaining 23% of PV margin comes from 63% prospects

MARGIN ($) / # PROSPECTS

Do you systemically define and scope the population of an agreed & identified prospect pool for sales exec targeting

implemented (yes/no/ partly)

Do you have a systemic pipeline/ opportunity management tracker & toolkit that could be audited by observing the way target prospects
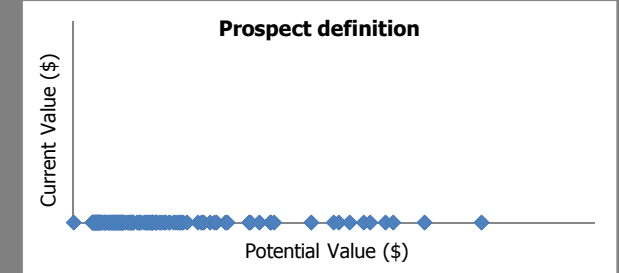
(yes/no/ partly)

Improvement factor

Prospect pool

1. Prospect 2. Qualify 3. Manage 4. Propose 5. Close
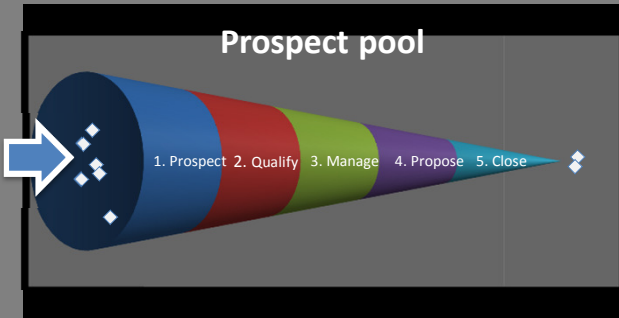
How large is your pool of

Considering existing & any new markets/ segments - what will be your target prospect pool size in

Prospect definition

Current Value ($) / Potential Value ($)

For what percentage of your prospects do you have

What is your target percentage of prospects to have defensible

Improvement

Prospect Solicitation

1. Prospect 2. Qualify 3. Manage 4. Propose 5. Close
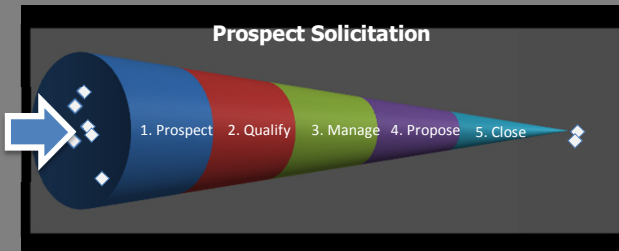
How many prospects did your sales team visit for the first time

What is the target number of prospects your sales team will

Improvement

Proposal Submission

1. Prospect 2. Qualify 3. Manage 4. Propose 5. Close

How many prospects did your sales team submit a proposal to

What is the target number proposals for your sales team to submit in the current/next

Improvement factor

Weighted Prospect Penetration improvement factor