

# REVIEW REGRETS PART 2

In the last edition [STEVE HOYLE](#) considered some of the common mistakes that account managers make in review meetings. This time he looks at mistakes made by sales managers

**A**ny review meeting, examining an opportunity, an account, or a territory/portfolio of accounts, is almost certainly going to involve a lot of very expensive people, preparing, taking part in and following up on actions from the review.

The review can be a great forum for helping the account team by providing a sounding board, coaching, sharing ideas and best practice as well as agreeing to resource requests.

Reviews can also be a complete waste of time, and in some cases even demotivating, if the management attendees don't treat them as seriously as they deserve.

Account managers may want to review the previous article (*Winning Edge*, July/August) to make sure they are always doing the right thing, and then read through below, before placing a copy in a position where their sales manager cannot help looking at it!

Here are some of the common mistakes that sales managers make in review meetings:

**CLARITY OF PURPOSE:** not being clear on their objectives for the session and simply reviewing for the sake of reviewing. There are many legitimate reasons for conducting a review including to:

- Gather information so that they can make decisions about scarce resources
- Make decisions on commitments that the sales person is requesting
- Find out about the state of the account/market
- Help and coach the account manager or team to improve the plan.

**NOT SETTING THE RIGHT TONE:** it is amazing the power that a sales manager has in most organisations, and how they set the tone at the start of the review can have a major impact on how it ends up. In particular, being overly formal and downbeat can get everyone defensive from the start, while being too informal can result in a lack of professionalism and rigour, again having a big impact on the eventual outcome.

**BEING TOO SUPERFICIAL:** it is easy to fall into the trap of 'seeing the big picture' when often the devil is in the detail. Clearly, you need an overview of the current situation and the overall plan, and you will not normally have time to delve into every detail, but if you don't carry out a deep dive into relevant parts of the plan you will find it very difficult to really appreciate the thoroughness of the job that has been done, or to give detailed coaching and advice to the relevant salespeople.

Judging where to go into detail is difficult and one of the reasons why sales managers need to practise and continually improve their ability to conduct great reviews. Areas that are often fruitful to consider are:

**1. The customer's high level imperatives and KPIs**

– what are they really worrying about and what will drive their decision making

**2. People** – understanding the individuals involved, and exactly who is involved in decision making, what their role is and what is driving them

**3. Tactics** – making sure that the plan is grounded in firm actions.

**DIVING INTO TOO MUCH DETAIL:** conversely there is a temptation for some sales managers to go straight to the detail, without understanding the overall context. In this case, the big danger is that you miss critically important clues that could open up new opportunities, or signal massive threats to your business. Best practice appears to be that you need to get the 'big picture' first, and then choose the areas to go into detail.

**NO SUPPORT:** although cynical sales managers may occasionally

disagree, account managers will have put effort into preparing the plan for review and there will be many good aspects of their work. If you don't tell them what they are doing well, then they may try and avoid the sessions, treat them very defensively (go into survival mode) and start resenting you as their sales manager. In reality, even the most seasoned salespeople need to be told when they are doing well.

**NO CHALLENGE:** as well as letting people know when they are doing a good job, the only way that plans actually get improved is through some level of challenge. It is legitimate and desirable for sales managers to challenge areas that they are uncertain about, where they think the plan can be improved, or critically important areas where they want to make sure that there has been rigorous thinking behind the plan.

In practice, three of the most powerful questions that a sales manager, or any reviewer, can ask are:

**A** What alternatives did you consider?

**B** What did you decide not to do?

**C** Why? Please explain your thinking behind this part of the plan.

**NO INTERACTION:** in the majority of cases, sales managers show a keen interest in the business review and the problem is mostly in having to stop the conversation,

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but in the worst cases sales managers don't probe the plans in order to gain better insights, or to debate different approaches.

**TAKING NO RESPONSIBILITY:** there are certain sales managers who will do all that they can to avoid getting anything written onto their own 'To Do' list. They may or may not play an active role in the review meeting itself, but certainly don't want to be accountable for owning any actions or taking any responsibilities. Often, it is only the sales manager who can effectively manage an action, particularly if it is to do with escalating matters internally. Even in situations where they can delegate everything to others, experienced sales managers know that to be an effective leader they have to get involved in the day to day actions with the rest of the team.

**TAKING ALL OF THE RESPONSIBILITY:** conversely, sometimes sales managers fall into the trap of trying to do it all themselves, believing that they are the best salesperson in the team and the only one with the authority or drive to get things done internally. Account managers need to be wary of such managers, as although their involvement can be a welcome resource, they are likely to become the bottleneck very quickly, and may as

a result unintentionally disempower the account manager and the account team.

**NO FOLLOW-ON:** almost certainly there will be some new actions coming out of the review session. This could be additional tactics in the plan, agreement to get certain resources assigned, agreement to follow up with other parts of the organisation. Sales managers need to ensure that these actions are documented, with owners assigned and a follow up agreed and scheduled.

**NO CLOSE:** it is to be hoped that the account manager will close the session with a summary of decisions and actions, but whether or not they do, a good sales manager will want to do the final close. In most cases they will want to thank the people who participated and point out what went well in the review process itself and how it could be even better in the future, as well as raising any generic issues that the session has uncovered for the sales team or the whole organisation.

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*Contributor* **Steve Hoyle** is a sales consultant, coach, trainer and interim manager specialising in helping clients to grow the capability of their sales teams in complex B2B environments. He can be contacted at [steve.hoyle@linksdev.net](mailto:steve.hoyle@linksdev.net) or on 07785 381563