Mercuri International

SALES ACTIVITY MANAGEMENT

PROGRAM OVERVIEW

Mercuri International

SALES ACTIVITY MANAGEMENT

This program gives a structured model with which to analyse and manage sales activities, thus improving sales results. It is based on Mercuri's **RAC-PASS** model – **R**esults are a consequence of the salesperson's **P**ortfolio, on which some **A**ctivities are performed based on personal **C**ompetencies. By analysing all these components, it is possible to develop a **P**lan of **A**ction that also includes a **S**upport and **S**upervision program.

AUDIENCE
Both sales managers and sales professionals who could benefit from a clear and effective structure to analyse, measure and steer sales performance.

DURATION
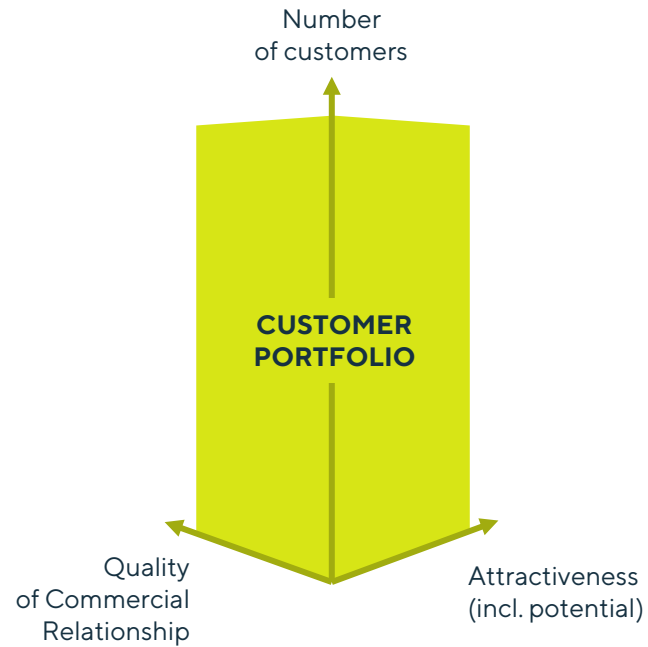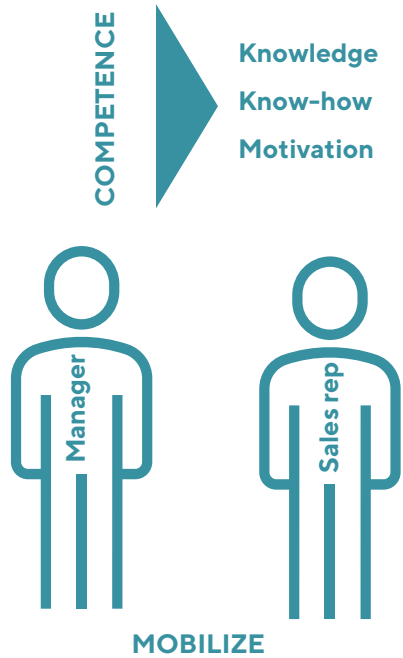Digital content: **2 hours 30 min**

DELIVERY FORMAT
100% digital or in combination with face-to-face or virtual classroom.

Storytelling approach with a sales representative and their manager or colleague. Videos, exercises, questionnaires, downloadable documents, interactive scenarios, digital case study and open forums to connect with the community. All material is supported from laptops, tablets and smartphones.

PROGRAM OVERVIEW

The RAC-PASS model helps analyse the factors that influence sales results in order to develop an appropriate plan of action. This will ensure that results achieved are in line with the sales policy of the company.

COMPETENCE

Knowledge
Know-how
Motivation

Manager

Sales rep

MOBILIZE

SALES ACTIVITY

Quantity

Direction

Quality

Plan sales activity

Number of customers

CUSTOMER PORTFOLIO

Quality of Commercial Relationship

Attractiveness (incl. potential)

External Factors

RESULTS

Sales policy

Internal Factors

CONTENT OVERVIEW

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1

INTRODUCTION

- Understand what the RPAC-PASS methodology is about and how it links all the elements together

2

RPAC – RESULTS

- Analyse the correct indicators to understand the structure of sales results and how close it is to the target

3

RPAC – PORTFOLIO

- Learn how to objectively analyse the strengths and weaknesses of the customer portfolio to forecast income with more precision

4

RPAC – ACTIVITIES

- Understand how to improve the effectiveness of sales activities by taking into consideration the key indicators

5

RPAC – COMPETENCIES

- Discover what key competencies should be developed to carry out the activities needed to achieve sales results. Do this by learning how to read the results, portfolio and activities analysis outcome

6

PASS – PLAN YOUR FUTURE

- Create a sales Action Plan based on the results of the RAC analysis and define what kind of Support and Supervision is needed to achieve target results

7

LET'S PRACTICE!

- Look at the data provided and analyse the Results, the Activity and the Competence of each member of your fictional team in this case study.
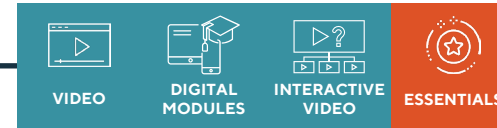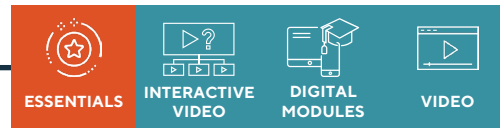
LEARNING PATH

WELCOME

VIDEO | ESSENTIALS | POLLS/OPEN QUESTIONS

INTRODUCTION

VIDEO | DIGITAL MODULES | INTERACTIVE VIDEO | ESSENTIALS

R(p)AC - RESULTS

ESSENTIALS | INTERACTIVE VIDEO | DIGITAL MODULES | VIDEO

R(p)AC - ACTIVITIES

ESSENTIALS | INTERACTIVE VIDEO | DIGITAL MODULES | VIDEO

R(p)AC - PORTFOLIO

VIDEO | DIGITAL MODULES | INTERACTIVE VIDEO | ESSENTIALS

R(p)AC - COMPETENCIES

DIGITAL MODULES | ESSENTIALS

PASS - PLAN OF ACTION WITH SUPPORT AND SUPERVISION

DIGITAL MODULES

LET'S PRACTICE RAC MODEL CASE STUDY

PATH CERTIFICATION

Also available including face-to-face or virtual sessions along the path

CONTENT DESCRIPTION

STEP 1: INTRODUCTION

The Purpose of Sales Activity Management

Raising awareness of the importance of good Sales Activity Management is key to obtaining a comprehensive view of the current situation and understanding how to improve it. A structured approach helps to keep track of all the elements that need to align to achieve great sales Results.

Participants are introduced to the RAC-PASS system, a model that guides them while managing sales activity. They discover:

- The purpose and reason for Sales Activity Management

- The elements that need to be analysed and the steps to perform

- The link between all these elements and how the RAC-PASS system can help managing them
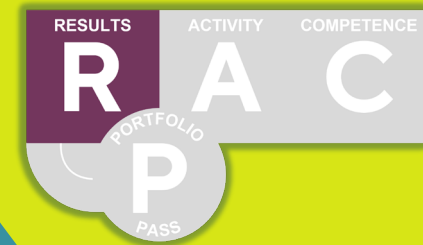
STEP 2: R(p)AC-PASS – RESULTS

More than just total revenue

The very first step to take when managing sales activity is to understand how close the Results are to the company standards. Results should have a positive trend over time by responding to the company's strategic objectives.

In this step, participants:

- First encounter 'Lisa', a fictitious character around which a case study is built

- Discover the correct indicators with which to analyse sales Results

- Learn how to perform the analysis

- Apply their knowledge to Lisa's case

STEP 3: R(p)AC-PASS – PORTFOLIO

No customers, no sales results

The amount and type of business that occurs is strongly influenced by the people who buy – the customers.

To achieve great results, you need the right customers in the Portfolio.

This is where participants:

- Learn how the Portfolio influences the structure of the results
- Discover the indicators with which to analyse the Portfolio
- Apply their knowledge to the case study
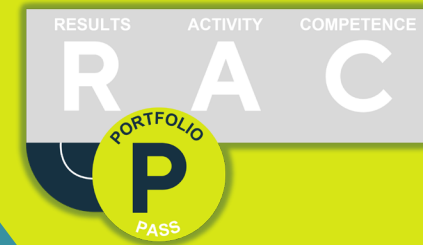
STEP 4: R(p)AC-PASS – ACTIVITY

Managing the effort

Sales Activity obviously has a direct impact on Results – depending on the actions you perform, you get different Results.

The more accurate the Activity analysis, the easier it is to improve sales Results.

More specifically, participants discover:

- How the Activity analysis can give deeper meaning to the Results' structure
- What activities are worth performing to be compliant with the company's strategy
- How to apply their knowledge to a case study

STEP 5: R(p)AC-PASS – COMPETENCE

The human side of analysis

Figures are essential to manage Sales Activity, but it's important to remember that it's people who perform the activities, deal with customers and achieve results. That's why considering Competence is key.

Since there are no objective numbers, this is possibly the most difficult analysis to carry out.

In this step, participants:

- Understand how Competence has an impact on both Activity and Portfolio, and ultimately on the Results

- Discover what indicators to consider for the analysis

- Learn how to perform the analysis in the most objective way

- Apply their knowledge to Lisa's case

# STEP 6: PASS – PLAN OF ACTION WITH SUPPORT AND SUPERVISION

Planning the future

After all the hard work of gathering and analysing data, it's finally time to take actions and define the next steps to improve sales performance.

The RAC–PASS system now offers a structure to plan improvements and support them.

More specifically, participants learn to:

- Set new challenging, yet achievable, objectives
- Develop an action plan
- Understand what training is needed
- Define how to encourage the implementation process
- Learn how this is applied to the case study
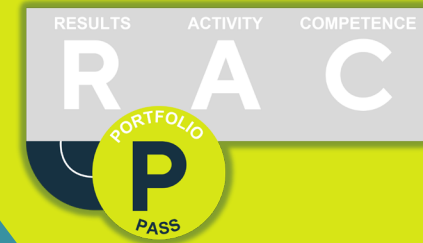
STEP 7: LET'S PRACTICE – RAC MODEL CASE STUDY

It's time to play & learn!

After completing the Sales Activity Management learning path, this digital case study helps learners concretely apply the RAC model.

Look at the data provided and analyse the Results, the Activity and the Competence of each member of your fictional team in this case study. Apply the RAC model and provide clear guidance to each sales person.