

4roles™ – The Sales Manager's Four Roles

This is the model that describes, and adapts, the Sales Manager's work tasks and work patterns. When Sales Managers are recruited and developed, roles are often described in terms of skills and experience, what the manager is expected to achieve, along with areas of responsibility. Far too often there is no firm outline of the work tasks and activities expected of the Sales Manager. This model provides a complete role description for a professional Sales Manager, including concrete activities that they are expected to perform, and how often.

It is the responsibility of the company's executive management/Sales Director to ensure that all four roles are fulfilled effectively. The Sales Manager's manager is a key figure in terms of ensuring that the Sales Manager function is professional and competitive, and should therefore apply this model to steer the focus and development of the Sales Manager's work.



Figure: The 4roles™ model for Sales Management

The Manager Role

The Manager role includes planning and organizing the sales work. Such tasks are often performed individually, or possibly alongside a specialist, a fellow manager at the company, or a senior sales rep. The manager gathers facts, analyzes and plans how the overall results should be achieved for the team and each individual. The role also involves preparations (ahead of meetings, performance reviews, coaching and so on), as well as budgeting and reporting.

These tasks optimize local market conditions, how the company's position can be capitalized upon, and how the customer base can best be developed, along with the company's entire product portfolio. The Manager role is very much about working towards the results targets that are in line with the company's overriding ambitions, strategies and economic key figures.

This process calls for both analytical and administrative skills. The manager needs to have knowledge of the market, competitors, and above all customers. They require an insight into the home company's overall business ambitions and strategies, as well as an understanding of business economics.

The Leader Role

The Leader role is about leading and allocating the day-to-day work. This role includes the tasks conducted in direct interaction with the sales team and the individual sales rep. The leader communicates results targets. Having said that, this role is primarily about working with activity objectives. Allocating tasks, delegating, motivating, instructing, carrying out team meetings. Securing the right quantitative effort, the right focus and the right quality in the sales rep. The leader role includes ensuring that the team and all individuals in it actually carry out the activities that lead to individual results targets, in line with the company's set strategies.

Leaders instill in their people a hope for success and a belief in themselves. Positive leaders empower people to accomplish their goals.

This role requires leadership skills, and an ability to adapt that leadership to different challenges and situations. The leader needs to be able to establish formal authority, yet perhaps even more importantly to be accepted as an informal leader; someone that people choose to follow, regardless of rank or power. The role requires communication skills, an ability to give feedback, and to run inspirational meetings with teams and individuals. A leader must have an insight into different ways of motivating, and also be able to judge the motivation profiles of different individuals.

The Coach/Trainer Role

The Coach/Trainer role entails developing personnel and providing support for personal development. The coach/trainer ensures that competence goals are set, that there is consensus on the development need, and that development is genuinely monitored, measured and consolidated, and that the change is lasting. Tasks include conducting joint visits, training, coaching, giving feedback on quality and behavior, sharing knowledge and best practice. The role involves ensuring that all the necessary skills and competence (to execute the activities required to truly achieve the results) are in place.

The Sales Manager needs to ensure that competence is developed in accordance with the strategies and guidelines established by the company. This role also works in close personal interplay with the team in general and the individual in particular. There is some overlap between this role and the leader role. Strong leadership is, of course, motivating and developmental in and of itself. The specific purpose of this role is to ensure that skills and competence are genuinely developed in the short and long term. The role requires insights and skills in teaching and training methods, coaching, and communication.

The Sales Expert Role

A professional Sales Manager should be able to act competently out in the field in contact with customers, this does not mean that they have to be the best sales rep! It means that they should be able to give a practical demonstration of real-life sales work out in the field. The sales expert should also be able to conduct joint sales visits and be able to assess what is working well, and where there is room for development in the sales rep's approach. Concrete work tasks in this role include taking part in customer meetings as a senior sales specialist, helping to prepare customer visits, selling to their own customers, resolving difficult customer situations/problems, as well as negotiating and adapting sales patterns.

There are several aspects to the role of sales expert. The main focus should be on supporting the sales team in their day-to-day work in the field. The sales expert should also be able to give their own input in some specific situations, when this would help to ensure a positive sales outcome. This is a balance that should be discussed with the company’s executive management. This area of expertise involves understanding and being able to redesign sales processes and sales patterns. The Sales Manager should be able to evaluate an individual sales rep’s sales work, and then develop it to assure sales success.

To sum up, every Sales Manager has different tendencies, preferences, talents and experience to draw on. Their role models have taught them one way, and the corporate culture influences and drives them in a particular direction. Most Sales Managers feel more comfortable in a particular role. What this means is that most Sales Managers spend more time in one role doing particular work tasks and less in others, regardless of where focus should be in a given situation.

The aim of this model is to help Sales Managers to be aware of their overarching responsibility, to clarify expectations on the kinds of activities that need to be carried out for sales reps to succeed in their work, and how often (frequency) various tasks need to be carried out.

Needless to say, the exact description of the 4roles™ will vary somewhat depending on company, sales process, sales strategy, the level of the sales reps, and so on. Below is a chart showing what the 4roles™ might look like, with expectations on activities and frequency.

Manager		Leader	
Activity	Frequency	Activity	Frequency
Annual Business Planning	Annual, with review after 6 months	Sales Team meeting in person, ¼ day	Monthly
Sales Objectives	Annually, ready in Q4	Team meeting using teams, 1h	Weekly
RACE Plan	Annual, ready in Q4 and, reviewed in RACE Talk	Annual Business Planning	Annual, reviewed in quarterly Business Reviews
Analysing sales	Monthly	Manage Campaigns and Product Launches	4 per year
Reporting results and performance	Monthly	Large account planning	Annual + Quarterly review
Forecasting	Quarterly before Business Reviews	Internal Events – Teambuilding	3 per year
Meeting preparations	Before each specified meetings	Ensure sharing of information and experiences	Quarterly after Campaigns and Product Launches
Meet and coordinate with other functions	Minimum quarterly before Campaigns and Product Launches	Handle difficult situations	When needed
CRM and ERP systems update and analysis	Continuous, at least weekly	Manage Performance	Daily
Analyse and update Sales Pattern and work pattern	Quarterly, connected to Campaigns and Product Launches	Delegate	Daily

Coach / trainer		Sales expert	
Activity	Frequency	Activity	Frequency
RACE talk	Monthly, min 45 minutes	Contribute in customer meetings	1/month with every sales rep
Weekly individual meeting with sales rep	Weekly, about 30-45 min	Joint preparation of customer visit	1/month with all sales reps
Train new sales pattern	Quarterly before each Campaign/Product Launch	Demonstrate new sales pattern during joint visit	Minimum 1/ sales rep during each Campaign/Product Launch
Coach under-performing team-members	When needed	Improving sales behaviour	Review once every product launch during sales team meeting
Coach special situations	When needed	Own sales	Minimum 3 customers, based on discussion with superior
Large account review	Quarterly		
Joint Visits for coaching purpose	Minimum 2 per month per sales rep		
Joint Visits for supporting sales	When needed		

Figure: Examples of 4roles™ for a Sales Manager

Do you want to know more about 4Roles or other Sales Management tools?
 Read more at www.3s.se
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