



## Professional Development

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# Fundamentals of Effective Sales Management

## *A New Workshop for Leasing Sales Managers*

**September  
18-19, 2006**

**Melrose Hotel  
Washington, DC**



### **Key Benefits of Attending**

- Increased understanding of what makes for an effective sales manager in leasing
- Build your ability to take practical steps to agree, communicate and deliver sales budgets and plans
- See and use three powerful ways to improve the sales results of individuals
- Develop your skills in dealing with high-performers, under-performers and the middle of the road salesperson
- Work on ways to balance your own selling time with your role as a sales leader
- Explore ways to weld a group of individual sales people into an effective sale team
- Examine the options for visiting the customer with your salespeople. Work on different techniques for different situations.
- Benchmark yourself and your sales team against your peers
- Take time to reflect on how effective you are and refresh your motivation
- Come away with powerful, practical tools to help you meet and beat demanding sales and profit targets

*Your sales managers are on the line to make things happen for the organization.  
Give them the skills to perform at their best.*



# Fundamentals of Effective Sales Management

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## A New Workshop for Leasing Sales Managers

This workshop is designed to stimulate thinking and action for sales leaders in ELA member companies. The agenda brings together specific sales management issues in leasing with proven techniques that will generate sales growth.

Attendees will be asked to complete a secure and confidential web questionnaire prior to their arrival that will provide benchmark data. Attendees will be able to compare their sales effectiveness with their peer group without revealing their individual data to others.

## Who Should Attend

Sales professionals who are currently in management positions within equipment leasing companies.

## Workshop Schedule

### Day One

7:30 – 8:30 am

Workshop Registration  
Continental Breakfast

8:30 am – 12:30 pm

Morning Sessions

12:30 – 1:30 pm

Hosted Luncheon

1:30 -6:00 pm

Afternoon Sessions

6:00 – 7:00

Hosted Reception

### Day Two

7:30 – 8:30 am

Continental Breakfast

8:30 am – 12:30 pm

Morning Sessions

12:30 – 1:15 pm

Hosted Luncheon

1:15 – 3:45 pm

Afternoon Sessions

## Workshop Agenda

### I. Trends, challenges and opportunities in strategic sales management

- Insights and comments from thought leaders
- Observations from Mercuri International in the marketplace
  - Sales trends and challenges in leasing (includes findings from the Mercuri/ELA sales management benchmark survey)
- The measurable links between effective sales management and the sales result

### II. Converting the business strategy into a concrete plan to secure the sales result

- Spotting the differences between success and failure
- Gathering and assessing market information in leasing
  - What is happening out there in the marketplace?
  - What changes do you see over the coming year?
- Setting and communicating clear sales policies
  - Options on customer segmentation and grading; channel management, product design and mix; sources of organic growth from new products and/or new customers
  - Where does sales strategy fit in the business and financial strategy
- Effective target and budget setting using multi-dimensional approaches
  - The challenge of agreeing on sales targets that mean something to individuals, are achievable and which deliver what the business needs
- Managing activity and competence

### III. Directing and managing activity. The three aspects of sales activity that leaders can influence: Quantity, Direction and Quality of sales activity.

- The role of the sales manager in monitoring, analyzing and planning
- Quantity of activity
  - Ensuring that there is enough sales activity by individuals and teams
  - Benchmarking levels of sales activity
- Direction of activity
  - Product, channel and customer mix



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## Workshop Agenda *continued*

- Multi-level selling – taking the leasing message to a strategic level in the customer
- Balancing existing and new business to optimise a sustainable result
- Introduction to key account management into the sales strategy
- Quality of activity
  - Sales processes and benchmarking
  - A look at sales process, conversion ratios and other key indicators
  - The link to competence

### IV. The strategic impact of building sales competence

- The link between competence and result
- What does sales competence look like for leasing companies?
  - Benchmarking of sales competences
- The role of the sales leader
  - Defining and measuring competence
  - 1:1s
  - Joint visits
  - Sales meetings

### V. Motivation and how it applies to sales people

- What really motivates people?

### VI. Options for creating, building and retaining a motivated and competent salesforce – Recruitment, Training, Coaching, Rewarding

- Key people skills for sales managers
  - Listening and giving feedback
  - Working with individuals: coaching under-performing, high performing and middle-raking sales people
- Joint visits: why these matter and ways of working. Techniques for different scenarios
- Sales meetings: bringing people together to make a sales team

### VII. Action Planning

Attendees build their own 90-day plan to make sure they get payback from the workshop

### VIII. Concluding Remarks



# About Mercuri International

Mercuri International, the largest sales performance and training consultancy in Europe, was founded almost fifty years ago. The company is a recognized expert in helping organizations to grow organically via improved sales efficiency. Their goal is to optimize the sales processes and develop the people and managers involved in them.

Mercuri International employs over 700 people, with a presence in 40 countries around the globe. They have been chosen as a partner by more than 15,000 organizations, some of which are operating in up to 20 countries simultaneously. Relationships with clients have lasted for more than 15 years. Each year Mercuri delivers more than 18,000 events attended by over 330,000 individuals.

Mercuri's success comes from working alongside their clients with an absolute focus on the partnership to improve the organization's market position.

## About the Instructors

### RICHARD HIGHAM



Richard is the global sector head for financial and professional services for organic growth specialists Mercuri International. He has won and led relationships with some of Europe's largest financial institutions. His deep experience of long term projects in the financial sector include the design and delivery of comprehensive sales, service and leadership programs in financial institutions across Europe.

Over the past fifteen years he has worked with over 3000 individuals from more than 30 financial institutions, ranging from banks to accountants, actuaries, insurers, fund managers and private equity and asset finance houses. He writes regularly for publications such as *Financial World* on business development and relationship management issues.

Beyond the financial and professional services sector, Richard specializes in strategic account management. He was part of the Mercuri International/University of St Gallen team that conducted research with 560 European companies and then developed an account management model and toolkit.

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### JAMIE BARRETTE



Jamie Barrette is Vice President of Mercuri International. With a background in international business, Jamie has worked with a division of the Canadian Pacific group of companies for over 20 years holding positions that included General Manager and Director of Marketing for North America.

Jamie helped to lead in the development of the North American market over six years ago. Today, Jamie is currently the coach for the leadership team of a major Industrial Manufacturer; the sales strategist and trainer for several corporate North American sales teams; consultant to a major international transportation company; and project leader on several international projects.



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## Registration and General Information

**Please note:** In order for your name to appear on the list of attendees, ELA must receive your registration on or before Monday, September 11, 2006.

### Attendance Fees

ELA member (1st person):	\$1,495
ELA member (each additional):	\$1,345
Non-members:	\$1,995

### Non-Members:

If you are employed by a company that has not renewed its membership in the ELA, you must wait one year to attend this workshop as a non-member.

### Photographs Taken at the Conference

Please Note the Following. Photographs of speakers and attendees may be taken at this conference. These may appear in ELA publications or on the ELA website. By registering for this conference, you authorize ELA the right to use any photographs taken of you during the course of the Sales Management Workshop.

### How To Register

We encourage you to register online. However, if you prefer or need a traditional registration form, print the PDF of the conference brochure from this link: [www.elaonline.com/events/2006/ESM/](http://www.elaonline.com/events/2006/ESM/) and return the completed registration form with payment to:

### Mail-In Address

ELA, Dept. 733, Alexandria, VA 22334-0733. If using express mail, send to ELA 4301 No. Fairfax Drive, Suite 550, Arlington, VA 22203-1627.

### Register On-Line

You can register directly on-line at [www.elaonline.com/events/2006/ESM/](http://www.elaonline.com/events/2006/ESM/) via American Express, MasterCard, Discover, Diners Club, or VISA on our secure server. You will receive a confirmation number from the website.

### Register by Fax

If you are registering via credit card, you may fax your completed registration form from the PDF of the brochure [www.elaonline.com/events/2006/ESM](http://www.elaonline.com/events/2006/ESM) including your credit card information to: ELA Meetings and Conventions, 703-841-4329. A confirmation will be forwarded to you.

### Travel Information

#### Hotel Information

A block of rooms is being held for attendees of the Sales Management Workshop at the **Melrose Hotel**, 2430 Pennsylvania Ave., NW, Washington, DC. A special group rate of \$249 (single occupancy) or \$269 (double occupancy) + 14.5% sales tax is being offered to attendees. To make your reservations, call this number: **(202) 955-6400 or (800) MELROSE**. Let the clerk know you are attending the Equipment Leasing Association Sales Management Conference to get the group rate. Reservations should be made before the cut-off date of \_\_\_\_\_. Accommodation requests received after the cut-off are subject to availability and may be at a higher rate.



## Registration and General Information *continued*

### Getting There

In the heart of one of the DC's most notable neighborhoods is its newest luxury, upscale hotel - The Melrose Hotel, Washington, D.C. Just one block from Georgetown and the Foggy Bottom Metro station, The Melrose Hotel Washington, D.C. offers discerning business travelers and leisure visitors to the District a luxurious oasis in the heart of one of the world's fastest-paced cities.

The Melrose Hotel, Washington, D.C. is conveniently located between the White House and Georgetown on Pennsylvania Avenue. A brief taxi ride from both Reagan National Airport and Dulles International Airport, the hotel is also easily accessible by Metro, with a short stroll from the Foggy Bottom Metro station. Guests can conveniently travel between the District's historical and cultural attractions as well as key business locations by taxicab, Metro or on foot.

For further information about this property, including driving directions, visit their web site at [www.melrose-hotelwashingtondc.com](http://www.melrose-hotelwashingtondc.com)

### Official Airlines

United Airlines is offering special meeting fares for all ELA attendees of the Sales Management Workshop who use the Special Meeting Desk to book their reservations. Book early and take advantage of the promotional fares

that give you the greatest savings! Earn a 5% discount off the lowest applicable fare, including First Class, or 10% off the mid-week coach fare. By purchasing your ticket at least 30 days in advance of your scheduled travel you will receive an additional 5% discount. Simply call (or have your travel agent call) 1-800-521-4041 and refer to Meeting ID Number 552TS. Mileage Plus members receive full credit for all miles flown to this meeting. Tickets can be mailed by United, picked up at your local travel agency or United Airlines ticket office. You or your travel agent should call today, as seats may be limited.

### Cancellation Policy

1. Full Registration Refunded: Cancellation must be received no later than Monday, August 28, 2006.
2. Refund minus \$100.00: Between Tuesday, August 29, 2006 and September 11, 2006 a \$100 service fee will be applied to your cancellation request.
3. No Refund: No refunds of registration fees will be given for cancellations received on or after Tuesday, September 12, 2006.

*Please Note:* Cancellations by telephone will be accepted, but must be followed up with a letter that includes the name of the ELA staff member who accepted the cancellation. This letter may be:

- a. mailed to Morinia Scott at ELA headquarters
- b. faxed to (703) 841-4329, Attn: Morinia Scott, or
- c. emailed to Morinia Scott at [msscott@elamail.com](mailto:msscott@elamail.com)

### Substitutions

Substitutions for the entire program may be made at any time, including during on-site registration.

### Dress:

Business casual is appropriate for this workshop.

### Inquiries

If you have a question about the conference not related to registration, please call ELA Professional Development at (703) 527-8655

### Email for registration inquiries:

[msscott@elamail.com](mailto:msscott@elamail.com)

(Note: no registrations can be made by telephone)





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## Workshop Registration Form

Please complete and return this registration form and mail with payment to: ELA, Dept. 733, Alexandria, VA 22334-0733. If you are registering using Express Mail, send completed conference registration form and check to ELA, 4301 No. Fairfax Drive, Suite 550, Arlington, VA 22203-1627.

Please note: You may also register for this conference via the Internet at ELA Online at [www.elaonline.com/events/2006/ESM/](http://www.elaonline.com/events/2006/ESM/)

### Registration Fees

ELA member (1st person):	\$1,495
ELA member (each additional):	\$1,345
Non-members:	\$1,995

Cancellation Policy: I have read and agree to the ELA cancellation policy (*registration will not be complete unless box is checked*).

### Non-Members — Please read carefully.

If you are employed by a company that has not renewed its membership in the ELA, you must wait one year to attend this workshop as a non-member.

Yes, I would like information about my company becoming a member of ELA.

Please use one form per registrant; copy form for additional registrations. To ensure your name appears on the list of attendees ELA must receive your registration form and payment no later than **Monday, September 11, 2006.**

NAME \_\_\_\_\_

NICKNAME FOR BADGE \_\_\_\_\_

TITLE \_\_\_\_\_

COMPANY \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY/STATE/ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_ FAX \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

### Credit Card Reservations:

FAX this form to (703) 841-4329 Attn: Meetings Dept.

VISA  Mastercard  Amex  Discover  Diners Club

Total Amount to be charged \$ \_\_\_\_\_

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Name on card (PLEASE PRINT) \_\_\_\_\_

Signature \_\_\_\_\_

### Help Us Understand What You Want From Your Association!

To ensure that ELA focuses its efforts and resources on what you do, please complete the following two sections. *Note:* Registration for this conference cannot be completed without this information.

#### Section I.

I am primarily involved in the following market (*choose one*)

- Small Ticket** – Transactions under \$250,000 either individually or through lines
- Middle Market** – Transactions between \$250,000 and \$5 million either individually or through lines
- Large Ticket** – Single transactions over \$5 million
- Vendor Program** – Vendor and manufacturer support activities either as a third party or captive organization
- Service Provider** – All Associate members of ELA. Primarily involved in providing legal, accounting, software and systems support, as well as other specialized professional services

#### Section II.

My Primary Job Function and Areas of Interest

(*Choose no more than three*)

- |   |  |
|---|--|
| <input type="checkbox"/> Accounting (AC)              | <input type="checkbox"/> Legal (LG)                  |
| <input type="checkbox"/> Administrative (AD)          | <input type="checkbox"/> Marketing (MK)              |
| <input type="checkbox"/> Appraisals (AP)              | <input type="checkbox"/> Mergers & Acquisitions (MA) |
| <input type="checkbox"/> Asset Manager (AM)           | <input type="checkbox"/> MIS (IT)                    |
| <input type="checkbox"/> Broker (BR)                  | <input type="checkbox"/> Municipal (MU)              |
| <input type="checkbox"/> Business Development (BD)    | <input type="checkbox"/> Operations (OP)             |
| <input type="checkbox"/> Collections (CO)             | <input type="checkbox"/> PR/Communications (PR)      |
| <input type="checkbox"/> Consultant (CT)              | <input type="checkbox"/> Recruiter (RC)              |
| <input type="checkbox"/> Controller (CN)              | <input type="checkbox"/> Research (RE)               |
| <input type="checkbox"/> Corporate Executive (CE)     | <input type="checkbox"/> Sales (SA)                  |
| <input type="checkbox"/> Credit (CR)                  | <input type="checkbox"/> Syndications (SN)           |
| <input type="checkbox"/> Documentation (DM)           | <input type="checkbox"/> Tax (TX)                    |
| <input type="checkbox"/> Equip. Mgmt/Remarketing (ER) | <input type="checkbox"/> Training (TG)               |
| <input type="checkbox"/> Human Resource (HR)          | <input type="checkbox"/> Treasurer (TR)              |
| <input type="checkbox"/> Insurance (IN)               |  |

Confirmations will be forwarded after registrations are received and processed.

For Office Use Only

Account (#4110-0329)

Date \_\_\_\_\_ Approval Code \_\_\_\_\_ Amount \_\_\_\_\_