

# The Sales Process from a Project Manager's Perspective<sup>1</sup>

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## ABSTRACT

This case study was done within the framework of the class "International Project Contract", under Doctor Paul D Giammalvo's oversight for the Master "Programme and Project Management and Business Development" of Skema Business School.

Its aim is to analyse the sales process, the lifecycle of the product (start, production and end) under the control of the sales management. The core base of such a study here was the role of the sales manager-ment during the entire process.

There are different approaches to a proper sales management, which is quite ironic as theory and practice are two distinct things here. On one hand, it's quite hard to understand how far management influences the process, on the other hand it is quite interesting to see how far it has a direct impact on the risks that may be posed by such a process.

**Key Words:** Project Requirements / Production / Delivery / Responsibility / Logistic / Sales Management

## INTRODUCTION

As keynote sales speaker Mark Hunter has explained, "It's not about having the right opportunities. It's about handling the opportunities right." Even the least performant companies do have opportunities which they must handle right in order to move on. This example pretty much underlines how far the sales process is a complicated task and how far various actors of the company may deal with it.

The sales process may be (prior to the organization and structure of a company) the central part of a firm. It implies the purchase of goods and services so that it can be embedded to the company's schemes. But this procedure can't simply be seen as a mere acquisition, it also implies a purchase order which is the the formal and legal side of the transaction. In fact, beforehand there must be a precise definition of how the good or service is going to be fabricated, when it is going to be delivered and how it will be installed. This actually underlines

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the worries of the CSO of a company: they try to erase as many shadow points as possible in order to ensure the projects proper delivery.

Furthermore, this sales process is hiding who actually pulls the strings: the sales manager. For a correct sales process there needs to be a proper sales management. The main objective isn't getting rid of guessing points but rather being able to set the priorities of the process so that counterparts and other actors can understand the thorny issues they have to be meticulous with. Also, through a proper sales management, company's employees know what part they are clearly assigned to. Thanks to that and general meetings, the sales manager can have a frequent comeback of its co-workers, thus enhancing a good synergy and a good progress of the different procedures.

To put it simply, there are three sore points that need to be closely looked at by the manager:

1. A proper definition of the thorny issues through a clear purchase order.
2. A prioritization of the different tasks thanks to an efficient sales management.
3. Good communication and feedback in order to enhance the company's performance.

As a result, this initial study of the subject leads to the following problematic:

To which extent does the project manager have an impact on the sales management process?  
How far does he have the control on the project delivery?

### **Feasible alternatives**

1. Precisely define the needs and identify sore points
2. Establish a solution meaning the right approach to the problems
3. Set up an agenda and a program for the team that states clearly roles and duties
4. Enhance teamwork, emphasizing frequent feedback to keep a clear overview

### **Development of the outcomes**

#### **1) Precisely define the needs and identify sore points**

Even though in theory sales management follows clear rules, the practice is way vaguer on this point. In fact, many decisions depend on a concrete situation and can't accept a pre-established protocol. Taking care of the sales management mustn't be confused with having a rather supportive role (like coaching) in a team. Thus, defining the needs has to be seen as the process of properly defining the thorny issues that may undermine the whole project. Thus, by knowing precisely what issues the team may come across, the project won't be endangered and they keep a clear overview on budget and prices. By using this method, managers keep in mind future problems and adapt to it on long term.

**2) Establish a solution meaning the right approach to the problems**

This methodology provides comfort and serenity to the team. Through a very simple analyse of the solution, the sales management follows a rather 'classic' process, meaning: representatives meet with the manager, quickly analyse the situation and directly offer potential solutions. In a rather unsophisticated comparison, this method can be seen as a "Realpolitik". It is a move forward and adapt to the situation analysis: whether problems are known or not, they will be taken care of at a given time.

**3) Set up an agenda and a program for the team that states clearly the roles and duties**

This a very strict and rigorous method. No sore points are left without precise analysis: be it budget, time management or even team coaching. Everything has to be closely managed and known. By doing this, managers make sure to keep a complete control of things so that nothing will ever be a bother. Through those mechanism, the team moves on in a rather confident way as they believe they won't have to face any sort of thorny issues.

**4) Enhance teamwork, emphasizing frequent feedback to keep a clear overview**

This is a rather team focused approach. The manager leaves more freedom of action to his employees. By doing so, he then keeps an eye on what they are doing and through a frequent feedback he then directs them towards what he believes is the best solution. Even though, this approach seems rather risky, it also shows many perks. If done properly, the manager keeps the control on the project's progress. Furthermore, the employees and other co-workers aren't monitored, feel more important and their mood has a direct impact on the team's synergy.

**Attributes for a proper project success:**

1. Time-management: to which extant does the manager control the schedule (Agenda)
2. Monitoring of the team: is the team free to act and take initiatives
3. Synergy: is there a form of teamwork
4. Budget: does the manager have a clear overview on possible excess expenses
5. Reliability: to which extant risks are likely to undermine the whole project

Matrix Analysis				
Attributes	Long-Term Approach	Directive Approach	Team-Focused Approach	Move Forward Approach
Time-Management	1	1	1	
Monitoring of the Team		1	0	0
Synergy	0		1	0
Budget	1	1	1	
Reliability	1	1		

## Selection criteria

The objective was to find how far the manager has an impact on the outcome of the project, meaning how far through his tools, his administration and overall knowledge and ability to oversee the project can he enhance a favourable outcome. After the Matrix analysis we can clearly tell that the move forward approach is the least favourable one: it lacks time-management budget and reliability. The three others offer way more advantages as they have very few sore points (what can't be properly planed ahead or adapted to).

## Findings

Once the matrix analysis done, it appears as clear that the Move Forward Approach must be left aside as the 0 to 1 scoring method is unfavourable to a successful project. Not only is this option not reliable enough, but also the time-management and the budget are clearly sore points. On one hand, the 3 other options have pretty close scores, on the other hand they do not have the same weak points or the same strengths.

Matrix Analysis			
Attributes	Long-Term Approach	Directive Approach	Team-Focused Approach
Time-Management	1	1	1
Monitoring of the Team	0	1	0,7
Synergy	0,5	0	1
Budget	1	1	1
Reliability	1	1	0
<b>Total</b>	<b>3,5</b>	<b>4</b>	<b>3,7</b>

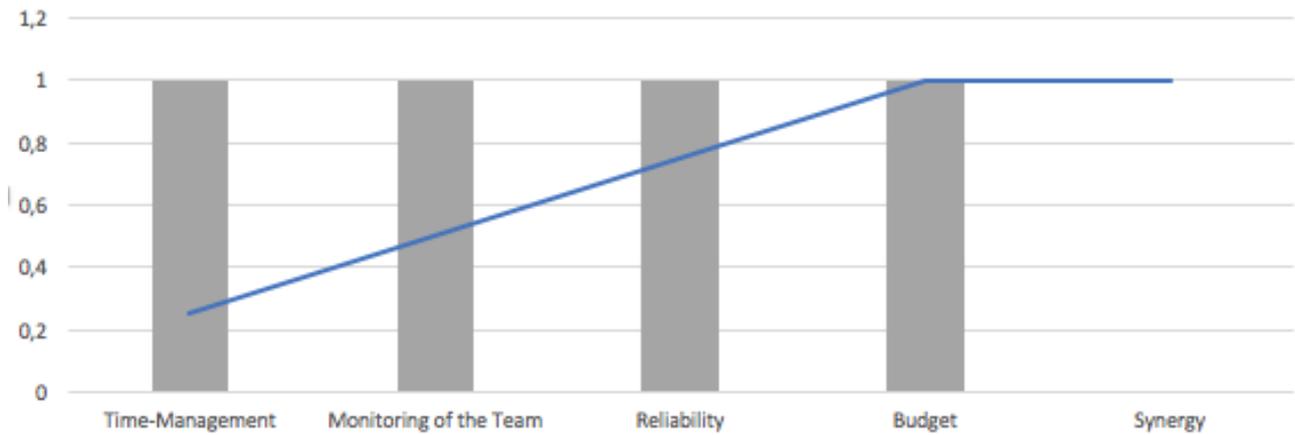
One again, the matrix analysis allows us to leave two approaches aside. In this case it concerns the long term approach and the team focused approach. After further analysis, the directive approach is 14% more efficient than the long term approach and 8% more efficient than the team focused approach. Even though the method is a bit harsh as the difference between the 3 approaches isn't that important, there still is a gap remaining that allows us to clearly say that the directive approach stands out. The two other options still are strong options that would probably have a better result in another context.

From the analysis and my knowledge, I would know strongly recommend the directive approach.

To make things clearer, I will know add a comparative pareto analysis. It will point out to which extant it is preferable for a Project Manager to choose the Directive Approach in order to

enhance the company's performance. In the first one I'm going to input the directive approach's data while in the second one, I'm about to input wrong figures.

**Cumulative impact of change in sales management, with directive approach**



**Cumulative impact of change in sales management, without directive approach**



After another further analysis it becomes clear that the directive approach is an efficient option, to such an extent that it has a direct impact on the monitoring of the team.

## Conclusion

The initial aim of this study was to determine whether project managers may influence the sales process (which they obviously do) and to which extent they can influence it.

### 1) To which extent does the project manager have an impact on the sales management process?

It appears that not only does the PM has a direct influence on the project, but that he is also the one that controls its performance. He is the one that oversees the overall project. He takes up the order and takes care of the managerial part, meaning he asses tasks and objectives. He knows where the project is heading to. We've seen that there are many ways on how to have a hand on a project, but also that the "traditional" assignment while still leaving a bit of freedom to the employees is the most efficient one. It's thanks to the different approaches that it appeared as evidence that the PM directly influences the project.

### 2) How far does he have control on the project delivery?

More than just an influencer he's one of the key actors. He takes care of the sales management, of the logistic, the production and even the initial requirements. A good sales process needs clear schedule, good budgeting and very precise coaching (which as we've seen can be done in various ways). Actually, to be even more precise, the PM knows when a project starts and ends, meaning he's the one who knows how to deliver the product.

Even though it was just an assumption, it appears that a good PM is the core base of successful sales management, thus of the project delivery.

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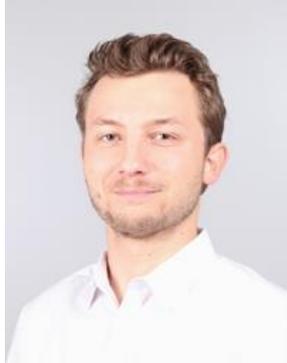
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## About the Author



### **Jonas Fieux Bencze**

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**Jonas Fieux Bencze**, is a curious and eager to discover new horizons student. Currently doing his M2, he is about to finish his 3-year program in project management and business development. He possesses a French and German background and has experienced life in both countries. These origins are the roots for his will to discover new people.

He was lucky enough to experience and be part of the world of work. Those experiences and origins mainly explains his interest in Project Management. Yet he wants to go further and has already increased new opportunities. His desire to try to explain the complex world of management can also be explained by his German sense of organization and his French creativity that he likes to apply to the further knowledge he would like to acquire so that he can build great things in his future workplace.