

The Issue

A Publication of the 2Go Advisory Group

Volume 11, Issue 3

Oct 2022

Q4 Survival Tips for Sales Leaders

By Lindsey Anderson

Partner, CROs2GO Lead Partner



Repeat after me: I will not miss another ski trip. Or holiday dinner. Or football game. Or high-school musical. Now say it again, but this time with feeling.

I've led more than my share of sales organizations, and I know what it's like to feel as though Q4 is actually killing me — or at least beating me to a pulp.

It's the last chance to make your numbers, plus you're working on planning for next year — building out a strategy, determining a budget, creating organizational and compensation models. If you're in SaaS, teeing up a great Q1 is critical. Then there's preparation for sales kickoff, which starts at what seems like 12:01 am on Jan. 1. Moreover, I haven't even mentioned spending holiday time with friends and family and even colleagues or all the other distractions that come with "the most wonderful time of the year." The competing priorities seem as though they conspire to defeat you at every turn.

The Issue 1

2GO Advisory Group



500 Ygnacio Valley Rd., Suite #410, Walnut Creek, CA 94596 Tel. 925.299.4450 Fax 925.935.1342

I've been doing this long enough to know there are tangible things you can do to make sure this time, this year, is different. I know you're thinking that ship has sailed, since Q4 is, like, **now**, but I am here to tell you it's not too late. Take my 8 tips to heart, and you, too, can avoid death by Q4 in the coming months.

CFOs2GO Partners

Joe Alouf
John Beasley
Douglas Burnet
Chris Chillingworth
Jess Gutierrez
Don Hawley
Jen Hotes
Jerry Johnson
Doug Kennedy
Bill Klein
Marc Loupe
Joe Markunas
Michael Matthews
Bob Miller
Chris Reynolds
Gordon Rogers
Rachna Singh
Seth Tuman
Dave Weber
Robert Weis

CCOs2GO

Jen McClure

CHROs2GO

Donna Hamlin

COOs2GO

Peter Gray

CROs2GO

Lindsey Anderson

Recruiting

Jodi Avina
Jeannine Kaiser

1. Prioritize your time and make a map.

Prioritizing sounds so much simpler than it actually is but you really need a detailed plan for where you're going to spend time through this quarter. Take a minute to figure out where your remaining selling days are and consider the length of your sales cycle. Know when your customers are available (they have competing priorities and time out-of-office, too). When are your budgets due? When can you start any hiring you need to do? And, of course, when is your big family holiday hoo-ha? **BOOK IT** into your calendar, and don't miss it. I make a map of everything using both paper and technology, so it's always staring at me, to ensure everything gets done.

2. Let someone else be the hero.

Sales leaders — all salespeople, really — love the win. They love to be the deal closer. They love to make things happen. But when you're a sales leader, you've got to depend on other people to do that. You just can't be the hero on every deal, and you need to make peace with it, because you have other things to do. Make sure your folks are executing appropriately, and definitely stay on top of deals, but you don't have to fly to every deal to be the closing hero. I've seen it so many times. A sales manager flies in at the end to have a 15-minute conversation their rep could have easily had. Don't do it. You don't need the credit. You need the time.

3. Delegate, delegate, delegate.

Deciding how and what to delegate is a matter of truly understanding your team and their specific strengths, then combining that knowledge with the criticality of the task. If my No. 1 issue is that I've got to stop and figure out what next year is going to look like and how I'm going to hit my budget -- and I've got a

couple of great sales reps I can trust to get deals done but no one who excels at working on forecasts — I work on the forecast. Delegate to the strengths of your team. If you find you have no one to whom to delegate, you've got some development work to do with your team next year. In the meantime, see No. 5, below.

The Issue 2

2GO Advisory Group



500 Ygnacio Valley Rd., Suite #410, Walnut Creek, CA 94596 Tel. 925.299.4450 Fax 925.935.1342

4. Align your resources.

Oftentimes, you need different resources from across your organization to close business. For example, maybe you need somebody to talk to a potential customer at a more technical level about the product. Chances are they don't report to you, so you need to understand your extended team's availability. Work with your peers to ensure those resources are deployed in a way that supports the whole business. If your peers are in their own Q4 hell and say they can't help, well, that's a conversation you'll need to take to the executive team about where the company most needs those resources. Sure, it's a whole lot better if you can work it out at the peer level, but don't be afraid to bump it up the chain in Q4 — if you don't make your numbers, you're the one on the hook.

5. Hire reinforcements.

If you're having trouble executing or delegating, a temporary shadow or consulting sales leader can be exactly what you need. First, figure out where your bottlenecks are. For example, if you're spending a ton of time just doing reporting for regular meetings, think about bringing in a sales ops consultant for some period of time. They can also help you implement your sales model and strategy for next year. Once you know where your holes are, plug them with outside talent.

6. Analyze your Pipeline

Know where you stand with every deal. See which ones you believe you're going to get, as well as which deals are iffy but a good fit and a significant size. Which deals are just not even a fit with your market? Understand those things and their impacts. If you close all the deals you know you're going to get, will you make your numbers? That's something most sales leaders have running in their head all the time but formalizing it can give you a great picture of where to marshal your resources. And if you realize you don't have enough pipeline, identify new opportunities, and expand your pipeline as early in the quarter as possible (like now). Worst case, it'll strengthen future quarters.

As if there weren't already enough swirling around in your brain, there's something else we have to think hard about this year: the uncertain economic climate. Are we going to grow? Are we going to sink into a recession? You read an article saying one thing one day and another one the next day saying the opposite. It's an unknown, so you need to be prepared. This year, modeling most likely as well as best- and worst-case scenarios — and accompanying "what if?" plans — is more important than ever.

Specialty Practice Groups

Accounting Services
Agri-business
Cannabis
Cleantech
Family Office
Financial Systems, Modeling & Reporting
Food Beverage & Consumer Products
Hardware & Software Technology
Healthcare & Life Sciences
International Expansion
Manufacturing
Mergers & Acquisitions
Non-Profit
Professional Services
Real Estate Development
Small Business
Start-up & Rapid Growth Companies
Turnarounds & Crisis Management

The Issue 3

2GO Advisory Group



500 Ygnacio Valley Rd., Suite #410, Walnut Creek, CA 94596 Tel. 925.299.4450 Fax 925.935.1342

7. Stay on top of your sales process.

If you start getting busy and ignore the basics, such as weekly one-on-ones, analyzing your pipeline and making sure your sales process is being followed appropriately, there's a greater risk deals are going to slip into Q1. Keep focused on your process and work it.

8. Encourage downtime.

If you're following my advice and not killing yourself in Q4, please also check on your team. Are they running themselves ragged trying to balance the requirements of work with the obligations of the season? Don't underestimate the value of downtime, even if it's forced, even if it's short. Manage your own stress level — I fall back on taking my morning hike and drinking a ton of water — to ensure you can be as effective as possible and encourage your team to do the same.

To quote JFK, "[Things don't happen, they are made to happen.](#)" OK, he wasn't a sales leader, but the words ring really true to me. A great Q4 isn't just going to happen — and a great Q4 shouldn't be defined *solely* by your numbers. At the end of the day, we need to hit the numbers, but you don't need to sacrifice your life to make that happen. If you take my suggested steps to heart, on the eve of Q1, you should be having dinner with your family or skiing wherever you love to ski, all the while knowing you've made your numbers and you've survived — maybe even thrived — through another Q4.

If you need guidance for you and your team, we are ready and happy to help. Contact Lindsey Anderson at landerson@cro2go.com or (408) 594-2837.



Lindsey Anderson is Managing Partner with CROs2Go, a division of the 2GoAdvisory Group. She has more than 35-years' experience as a Sales and Marketing leader for both public and private companies, and advisor to early-stage startups. She speaks and writes blogs on topics of leadership, revenue growth and customer experience.

The 2GO Advisory Group is the umbrella entity for CFOs2GO, CHROs2GO, CIOs2GO, COOs2GO, CROs2GO and CCOs2GO. We serve companies of all sizes and industries in a number of practice areas with recognized domain expertise and over 300 cumulative years of financial expertise. We are pioneers in meshing the dynamic financial management demands of small, emerging and established Fortune 500 companies with the work and lifestyle choices of today's top executives.

The 2GO Group was founded in 1986 to provide talent on an "as needed" basis, providing a complete continuum of services from consulting and interim engagements to direct hire placements. Companies need to be nimble to respond to corporate and market conditions with ease and agility. Our model of providing the optimal mix of talent and expertise in a well-designed and quickly deployed team — be it on a part or full-time basis, interim or direct hire — extends across a wide range of technical disciplines including accounting, finance, human resources, IT, Operations, and Revenue management. We offer traditional direct hire search and placement services at both the staff and executive levels rounding out the full spectrum of services

The Issue 4

2GO Advisory Group



500 Ygnacio Valley Rd., Suite #410, Walnut Creek, CA 94596 Tel. 925.299.4450 Fax 925.935.1342