A SALES CONSULTANT'S GUIDE TO

BEING A NEW SALES TEAM LEAD

(TRANSITIONING FROM SELLING TO LEADERSHIP)

JASON CUTTER

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FREE OFFER

As a way of saying thank you for reading this book, I'd like to offer you a free bonus worksheet to help you in your new Team Lead role. The New Team Lead Worksheet was designed to provide you with questions to ask yourself as you navigate into and through the Team Lead transition, especially from only selling.

You can download the free New Team Lead Worksheet here:
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WHO THE HECK IS JASON?

Who am I, Jason Cutter? Why did I write this book, and why would you want to read it?

I was not destined to be a sales professional. My early life and personality are not those anyone would consider as leading to the makings of a highly effective persuader and closer.

Growing up as an only child, I had a mom in banking and finance and a dad in engineering and project management. That means I had two analytical parents. Turns out my mom was also "anti-sales," based on experiences she had working at companies where she watched what the sales reps did to customers, and what they said about those customers after they left the store. On top of that, I was shy, awkward, and a late bloomer, who didn't fit in and ended up being bullied.

Thus, I was not a huge fan of *people*. My first job, other than delivering newspapers, was washing dishes at a restaurant. I just wanted to stay behind the scenes. My first retail job was at a pet store, in the tropical fish section. I liked fish, but I tolerated the people part. Then I went to college to earn my degree in marine biology, focusing on sharks.

I understood sharks way better than I did people. As I say all the time, sharks are simple—they have one thing on their mind and go in one direction. As long as you stay away from the business end, sharks are easy. People, on the other hand...!

Then, as you have guessed, life took me on a winding road to when I got my first sales job at age twenty-seven. I didn't even realize I was *using persuasion*. I just thought I was helping people get a mortgage. I was a much better Order Taker and sales operations guy than a salesperson. I spent the better part of the next eighteen years in sales leadership roles and then in my consulting company.

I never wanted to be in sales. I didn't play *Store* when I was a kid, pretending to sell my stuff to my toys, or even sell stuff to other kids. But after being in sales for so long, I realized a few things:

1. When done right, sales is all about *service* to the prospect.

2. Anyone can become great at sales if they choose.

Unfortunately, most people are like me—they fell into sales; they weren't planning on being a salesperson to earn a living. Even more unfortunate, and true, is that most people in sales don't receive adequate training, coaching, and mentorship. They are left to figure it out on their own.

That's what happened to me. And it was rough.

My guess is that is what happened to you as well.

Or maybe you are here, reading this, because you received training and want to brush up on your skills.

I wrote this book because it is exactly the kind of tool I wish I'd had in the beginning of my sales leadership career. I had no idea what I was doing. I was an operations manager at the time with no intention of running sales. Then they fired the original sales manager, so the CEO had me take it over. I wonder how many salespeople I could have helped succeed if I had known then what I have included in this book.

I wrote this book for you. How do I know that, considering we have never met? Because nearly every new Team Lead goes through a similar path of being put in the role with little or no support, raining, guidance, coaching, or even a manual. To me, the best path is clear for helping you succeed as a Team Lead, and it's what you are about to learn.

INTRODUCTION

Maybe you performed really well in a sales role, closing well above your quota/target.

Maybe you showed sparks of leadership.

Maybe you wanted to move up within your organization to expand your skills, career options, and income potential.

Maybe your company needed someone to fill a new team lead position, or someone moved up/out and left a vacancy.

Whatever led you to your new title, you now find yourself in charge of a group of salespeople who were probably your peers yesterday.

And if you are taking the time to read this, you want to win in your new position. (And you most likely feel like you will need to figure out how to win on your own.)

I am glad you are here. My goal is to provide you with insight, guidance, and action steps so you can perform at your highest level.

In this book, we will cover what to consider when becoming a team lead, six ways new team leads struggle and fail, and what you can do to mitigate each potential pitfall.

If you are ready, let's get started.

KEN AND SUSAN

Ken and Susan were both members of the sales team that relies on phone sales. They had different backgrounds before joining Tech Enrollment Group (TEG). Ken came from direct-to-consumer sales, working in call centers where he helped individuals manage their finances. Susan had been in retail sales with no phone sales experience prior to TEG. They both joined the company at the same time, going through training together.

Over the previous six months, Susan's effectiveness has continued to climb. It took some time to adjust. She was used to being face to face with potential customers where she could pick up on physical cues. In her new role, she had to learn to listen closely to what the caller said and did not say and to "read" their body language, personality, and responses without actually seeing them. Once she got that dialed in, closing above quota was easy. She was always in the top 10 percent for the sales team.

Ken, with his background in phone sales, was on a different trajectory in his first six months. He started strong, showed a lot of promise, then plateaued. It wasn't that he didn't have the skills; he just didn't push himself to do more. He found himself spending time on supporting, mentoring, and teaching the salespeople around him, even though that wasn't his job. But he found it hard to watch so many new people come in with very little training, get thrown onto the phones, and basically fight to stay afloat. He knew the new people had potential, and he hated seeing them fail and quit or get fired. He had many meetings with his manager about his performance, and each time he was reminded that his job was to close deals, not help the other reps.

Despite Ken not meeting quotas, the day came when he and Susan each got an opportunity to be promoted to team lead. The role offered higher base pay, between four and eight reps to manage, and continuing to close their own deals. Ken was excited because this position would allow him to start moving away from the phones and closing deals all day. Susan was a little hesitant because being the team lead meant more responsibility. Yes, there was the potential for more money, but she liked being able to focus on sales and being directly in control of her income.

SALES TEAM LEAD ROLE CONSIDERATIONS BEFORE YOU SIGN UP

I have seen a lot of people jump into leadership roles without fully considering what that meant. To most, it just seems like the *right thing* to do and a good career move. They accept the position and dive in without considering whether they truly want it or how they will succeed.

Before we even get into the contents of this book, I want to throw some (hopefully) thought-provoking questions at you to see if becoming a team lead might be a good thing for you, including in relation to your mental wellness, your career, and your bank account. Just like with personality tests, the key here is to be as truthful with yourself as possible. If you can't answer yes ("Hell yes!" is ideal), or if you are not willing to work on and improve in the areas you aren't a strong yes in, then I suggest you seriously reconsider taking a team lead position.

1. Are you open to feedback from managers/leaders above you (i.e., about your performance, what you could improve, what others are saying about you, how you are dealing with your team)?

2. Are you willing to take direction from your manager and implement/execute what they ask of you (i.e., a new script, updated pricing, a new prospecting strategy—you know, the things salespeople don't like changing)?

3. Do you enjoy helping others overcome challenges—like not being able to use the CRM (a customer relationship management program), overcoming client objections, figuring out how to make a conference call? (Really this means do you have the patience for people who don't seem to *get it*? Especially when it comes to things that seem easy.)

4. Are you a strong enough producer to exceed your own quota/requirements while also spending time helping your team when they need help (i.e., are you efficient and effective enough with your time, activities, and sales results to spend time and attention handling your team's questions/issues/needs)?

5. Do you understand that everyone is different (i.e., the team lead's goal isn't to turn everyone into a copy of you)?

How did you do on the above questions? When I ask potential team leads these questions, they don't usually say no to some or all of them; they often just aren't aware of how important these things are to the role.

The biggest misconception companies and new team leads have is the idea that "Since you were good at selling, you should be good at leading a team and helping them sell more." That pattern can lead to stress and/or failure, and I want to help change that mindset, starting with you.

Final note on these questions—hopefully, you were 100 percent truthful with your responses. Go with what your first gut instinct/instant response was. Our minds know what to do in most situations, and that first instant thought is usually the most accurate—coming before we start to overthink the question.

(If you want to check out a great book about instincts and first thoughts, check out *Blink!* by Malcolm Gladwell.)

If you did not answer "Yes, maybe, I am willing to work on/learn it," or "*Hell yes!*", you should seriously reconsider making the move to team lead. I promise if you go into it without the mindset needed, you will not succeed. And when you don't win in the role, it will take a toll on your mental wellness and finances. I'm not trying to scare you off. I'm just pointing out how self-awareness helps you succeed.

BASIC ASSUMPTION

I am going to make a basic assumption: You are good at closing deals. You can consistently exceed your quota. You put in the effort to work your pipeline and deals, you have developed your sales skills, and you know how to follow a successful sales process. This is why your company asked you to become a team lead or why you asked for a team lead role so you could move up within the company (maybe to make more money, have more responsibility, have more of a *career*, and get away from the grind of selling).

It's possible you are not great at sales. Maybe you hit your quota from time to time, sometimes exceeding it, sometimes falling short. You put in the effort, you try, but you feel you could help a team succeed more readily than closing deals on your own. You might have more of a supportive, leadership personality. That is a good path to leadership as well. Your path is yours—it is not right or wrong. And if you know you are actually a better leader than salesperson, that self-awareness is valuable.

WAYS NEW TEAM LEADS STRUGGLE & WHAT TO DO ABOUT IT

In this main part of the book, we will look at challenges new team leaders may face. We will look at these areas/categories through the lens of my experiences leading sales operations and from observations of what other companies do well and not so well. For each challenge, I will provide the same guidance I give my clients on how to mitigate the issue, thus giving the new team lead the best chance of winning.

Not all these categories/areas will apply to you. And to be honest, I hope you read them and find that none of them apply to you. That would mean the organization you chose to work for has done an amazing job of building a professional sales operation and a winning company culture. But if some (or all) of these issues exist within your organization, do not worry—it doesn't mean you picked the wrong place to work. It means your organization is normal. It also means you have the playbook for setting yourself up for success.

LACK OF TRAINING

If we continue with the assumption that you got promoted because of your sales effectiveness, your company might think if you did well with your own sales, you can help others. The challenge with this scenario is most companies then assume you do not need any training to be a successful team lead—that your effectiveness in various aspects of sales (CRM, phone system, pipeline management, selling techniques, overcoming objections) will translate into management effectiveness.

Unfortunately, that is not how it works. You see, you are good at sales. But management and leadership require different skills. Playing and coaching are two different skillsets. Many great players make terrible coaches. (I will cover why in the next section.)

WHAT TO DO ABOUT IT

I have two main suggestions for handling the scenario of being thrown into the deep end of leadership and told to figure out how to swim. The first is to ask for help. Go to your manager and ask for assistance in developing your leadership skills. Get training, coaching, mentors, book/podcast/video recommendations, etc.

Be mentally prepared for your manager to say, "You don't need any of that *stuff*. I didn't have that when I was promoted. You will figure it out. Just help your team close more deals." This would be disconcerting because it means your manager doesn't understand the difference between sales and leadership, or they are good at both and assume everyone else should be as well. In this scenario, where they won't help/guide you, I strongly recommend you keep going up the chain until you find someone who will invest in your success.

You might be concerned your boss will be upset if you go over their head, but this is one of those times when you need to focus on your own success. If you struggle and possibly fail, it will only affect you—mentally, financially—so take ownership of your career.

One of two things will happen. As you go up the org chart, you will find someone who will take a vested interested in your success, providing you resources to help. They might even institute a training program for new team leads after recognizing the lack of said program. They might actually thank you for bringing it to their attention.

Or they just might not care. They may have the same response as your manager. They might shut you down and tell you to just help your team close deals. If you get that response, I would seriously consider going to work for another company. The one you are at does not care about developing strong leaders or a culture of support, learning, and development. They are hoping to hire rockstars who know how to do everything without guidance.

The second way of overcoming a lack of training/guidance is to develop yourself. Don't wait for someone else to do it for you. If you want to become a better leader, take the initiative and put in the work. Don't wait for the world to do it for you.

Here is a short list to get you started on your own path:

- Read leadership books

- Listen to podcasts

- Find videos online

- Take a course

- Find a training program

- Hire a coach/mentor

Yes, some of those cost money. If you treat it like an *investment* in your career, future, and financial success, you can expect a return on investment—meaning you will pay attention, study, ask questions, and then implement what you've learned (instead of reading a book on leadership and adding it to a *shelf of books* you never think about again).

As you set out on a journey of professional development, be aware that everyone has their own style, and most of the coaches and trainers out there will tell you how they think it (whatever it is) should be done. That is not a bad thing, but it is critical to be aware of which techniques match your personality, style, experience, what you are selling, how you want to sell, and what type of goals you have, short and long term. Not every *guru* is your guru.

SELF-AWARENESS

A consistent part of the human experience is being self-centered. Yes, of course there are a lot of people who put others first and would give the shirt off their back to someone. But we could argue they are altruistic out of self-interests, and their motivation is still to benefit themselves—giving makes them feel better, look better, or offers an eternal reward.

Being self-centered isn't necessarily a negative. It is what keeps us alive long enough to create more humans. Being self-centered, combined with our need to be a part of a tribe, has led to our domination of the planet (for good and/or evil). It also leads to ineffectual leadership in ways most people aren't even aware of.

Here is the essential issue: Our default mental mode is to think everyone else sees the world like we do, thinks like we do, wants what we want, and likes/dislikes the same things. I am not saying this to be negative or put anyone down who operates this way. It happens to all of us, in small ways, in big ways, in some areas, or maybe in all aspects of what we think of the world.

For example, I feel I have come a long way in being aware of this area and in understanding everyone is different and sees the world in their own way. But one area still frustrates me—driving. I have yet to overcome my frustration with people who do not understand what the left lane on the freeway is for. Technically, it is called the "passing lane." Not the cruising lane. Not the "fast enough" lane. Not the "get-in-and-tune-out" lane. It is the passing lane. I know it shouldn't frustrate me, but I find it inconsiderate when people cruise in it, and my sense of *fairness* has difficulty accepting inconsiderate people.

All right, rant over, back to sales leadership.

Here is where this situation comes into play: If you are on autopilot mentally, you will assume everyone sees sales the same way. You will think others share your motivations (money, vacations, happy hour, awards). You will expect others to say the same things you would say in similar situations, that they will want to work as hard as you do, and they will care about the same things you care about (making calls, sending email, following up, putting info into the CRM.)

But everyone is different. Everyone has their own reason for being successful, their own mindset when responding to prospective buyers, their own motivation for how hard they want to work, and so on. When a company is not aware of being self-aware, what happens is they constantly try to find clones of the current leaders.

The leaders in the organization who started in sales may feel "their way is the right/only way to sell/operate." They will hire clones of themselves. And they will have little tolerance for those who are not exactly like them (usually leading to a strict interview process to weed them out, or if they do happen to make it onto the floor, firing them).

It's that lack of self-awareness and awareness of others that leads to leadership challenges. (I would argue that it also leads to challenges in relationships, especially romantic ones, but that is a topic for another book.) Again, we see this in a manager's frustration with their reps. The manager can't understand why reps won't do [blank] a certain way, or why they aren't saying [blank] the same way they would say it, or why they aren't motivated by [blank]. This situation produces poor results and a lack of moral for the manager and the team.

WHAT TO DO ABOUT IT

The short answer is: Become self-aware. Of course, like most things, it sounds simple, but it is not. Let's look at the areas I have found to make the biggest difference in finding/building self-awareness in new team leads.

First, let's look at the main category: "Not Everyone Thinks Like You Do."

Selling Style: Your sales style may be direct, aggressive, relational, consultative, dramatic, or whatever word you use. Your selling style is a result of all your previous experiences—as a customer, in sales, others' influence like the person who trained you in your first job, other salespeople, and what has worked best in closing deals. No single factor will lead to how you sell today and what led to your success.

Since experiences make us into the salesperson we are (I wrote about this in *Selling with Authentic Persuasion: Transform from Order Taker to Quota Breaker*), I don't think "Natural Born Salespeople" exist. I think they are made into selling professionals—some just start practicing at a very young age.

If we can agree that is the case, then the same holds true for all the salespeople on your team. They each have an infinite number of influences that lead to the way they sell and why they do it the way they do. Some of it might be training or skill; some might be very intentional.

Usually, none of what people do is intentionally meant to frustrate you. That's just a bonus! Sales managers start to become great leaders, in my experience, when they acknowledge not everyone will sell, think, and act like they did when they were a salesperson. Everyone is different. That doesn't mean they can't be successful at sales. It just means they are not you. Your goal is not to have clones.

I'm not saying there is no *good/proper* way to sell your company's product. Yes, some ways work better, some strategies close more deals, some phrases and scripting are more effective. Find the balance between what you did, do, and may do, and what the company has historically found to be the best practices. Then allow people to be human, be individuals, and bring their uniqueness to their role. As long as they close enough deals!

Experience: Like the *Matrix* movies, to me, once someone has done sales long enough, they can see the Matrix—you know, in the movie when the characters see all the weird green symbols, waterfalling down the background (they mean something if you can decode them). What I mean is they just *know* what to do when a prospect says something. They don't need to think about every action. It becomes automatic. Unconscious. They can see the Matrix.

What frustrates a lot of team leads and sales managers is they can see the Matrix (which is why they got to where they are), so they don't understand why their reps can't. Remember, not everyone on your team has the same experience in sales you have. Some will be brand new and need lots of adult supervision to close deals. Some have experience, but may be from different roles or industries and haven't sold the same products you sell.

Everyone's path to today, sitting in that sales seat, making and taking calls, is different. Your goal is to make the most out of the experiences people have (or don't have) and lead them to the promised land of exceeding quota and making money. Try this approach instead of being impatient or unhappy that they are not your clones.

Staying motivated is a part of sales success. Selling to other people is hard work. Even when you produce amazing results, most likely you are still closing about 30 percent of your leads—and losing 70 percent of the time. The key to long-term success is sales motivation.

Of course, intrinsic motivation is always the strongest (for more on that, check out my eBook, _A Sales Consultant's Guide to: Motivating Your Sales Team (So You Both Can Win_), but sometimes short-term motivation can help produce additional results.

Work Ethic: The next tool in your self-awareness toolbox is understanding not everyone has the same work ethic as you. Part of this is motivation—which is why I covered that above. Part of it is based on others having a big enough _why_ driving them. (Again, check out the _Motivating Your Sales Team_ eBook.)

I have seen many team leads get frustrated by reps who don't seem to work as hard as they did. The team lead says things like, "I don't understand why they aren't making more calls." Or "When I was a rep, I was making 100 calls a day." "When I was a rep, I came in early and stayed as late as I could."

If you moved up because of your success in sales, you know how much effort you put in to close sales and build your skills. Watching others who "don't get it" can be very frustrating.

Take a moment. Take a deep breath. Remember, not everyone thinks and works like you do. Use the motivation advice above, especially the thoughts in the eBook about people's _why_, to try to move them toward success.

Finally, maybe the reps who are struggling _and_ not putting in the effort aren't a good fit for the organization. That is not up to you to determine, nor is it your responsibility, as I will cover below, but it is something to be aware of. Always pass on your best leadership abilities to all your reps, so if they do fail, it is not due to lack of support from their team lead.

LACK OF SUPPORT

I wanted to start with you and what you can control, like your self-awareness and expectations of others. Often when we are struggling, we fail to look at ourselves. We can only control ourselves, so we need to be our first stop in identifying the problem.

But now I want to examine other, external, company factors that could cause new team leads to struggle and what you can do about it, if anything.

YOUR MANAGER

I won't talk about "bad" managers here—nothing like the movie *Horrible Bosses*. Lack of support from your manager is usually rooted in one or both of the following categories.

The first is a lack of management and/or leadership training—like how the *Lack of Training* section could apply to you. Fundamentally, the organization doesn't value or implement leadership training. Maybe the organization's leaders assume you should just know what to do, since you were good enough in your previous role. Maybe they assume managers and/or leaders are born, not made—you are either a good leader or not. Maybe they don't realize it would help their team improve if they provided training, coaching, mentorship, guidance, and tools—either from internal resources or through a third-party provider.

The second is they are overwhelmed. I see this in the majority of the organizations I work with. Each manager/leader on the org chart has a lot of responsibilities, a lot of things to focus on, is expected to respond to everything as quickly as possible, and has no guidance on priorities or focus management. (There is no such thing as "time management.")

I have seen many a manager crippled in their overall effectiveness by being caught in "admin hell": constant emails, producing reports, and meetings about meetings, and meetings that create more tasks that further overwhelm them. How do you spot a manager who has lost control and forgotten what they should be focusing on (i.e., their team's success at closing deals and generating profits)? They never come out of their office.

When a sales team manager is not on the floor supporting their team or their team leads, they have lost sight of their top priority. As I mentioned, it's not always their fault; rather, the difficulty lies with those above them and the person who is not allowing the manager to focus on the important task.

WHAT YOU CAN DO ABOUT IT

Nothing.

While I firmly believe strong, confident people can "manage up" (they can influence how their manager manages them), that strategy does not work when someone is stuck in the weeds of administrative tasks most of their day. They will not feel they have the time or energy to dedicate to you and your success.

The best thing you can suggest, and hope they will agree to, is to pay for and support you getting the outside resources you need. Find a coach or mentor who works with sales managers, especially ones who are familiar with your goals and focus as a team lead. Basically, you want to find someone who will act as your "manager" and help you stay focused, set goals, review your metrics, and help hold you accountable.

Sure, you can keep asking your manager for help, but most likely, they won't be able to help much. They might even say things like, "When I was a team lead, my manager didn't help me, and I figured out how to succeed." It's not their fault they didn't have a good manager, but it is up to you to stop the cycle. (Almost sounds like parenting or relationship advice. Maybe because managing/leading is like parenting, and everything is about relationships).

LACK OF TOOLS

This category is not about training, advice, or guidance *tools*, but actual business tools—reporting, metrics, technology. While you don't need to see all the metrics for every salesperson on the team, or for all the marketing efforts, you do need access to some metrics. Specifically, every metric/KPI (key performance indicator) that a salesperson is being held accountable for relative to keeping their job and/or earning commissions or bonuses. In a well-structured sales operation, these will also be the metrics you are held accountable for (regarding your own productivity and your support of the team achieving the required results). When the team is winning, you are winning. If you do not have access to constant, real-time or consistently delivered reports, how do you know if you or they are winning?

Another tool I see missing frequently is the ability of team leads to assist with live calls. Anyone who is tasked with helping a salesperson get better at their job and close more deals should be able to, anytime they want, listen in to a live call, whisper through their headset to only the salesperson, and barge into the conversation to help close the deal. If you do not have a phone system that can do that, and you are responsible for your salespeople's effectiveness, and your compensation is based on that, then you are playing a more challenging game than necessary.

WHAT YOU CAN DO ABOUT IT

For the metrics, get access to the needed reports, dashboards, etc. Whatever form of data your company has on the KPIs for you and your reps. Some companies will have a live dashboard. Others will compile the metrics and send out regular reports. You need to get access to these. Otherwise, it is like a sport with no scoreboard where you don't know if you won or lost until the game is over.

Keep in mind, your reps don't need access to all of these metrics. They could get too distracted. But you should have access. I have seen new team leads who had no idea what types of data/metrics/reports were actually available because they never saw them as a sales rep. And then they become a team lead flying blind, playing a game without a scoreboard.

The key is to get access to every metric you and your reps are being held accountable for. Most of the time, what I see is that the company isn't really paying attention to stats other than closed deals and closing percentage. But, of course, there are a lot more stats to track if you want to be a professional organization.

For the call monitoring part, get access to listening, whisper, and barge mode. It might even require the company to change phones/system providers. (If they need recommendations, email me jason@cutterconsultinggroup.com.)

SHOULDN'T BE YOUR JOB

New team leads are often asked to do things that really shouldn't be their job. They then struggle to complete these tasks. They do them, or attempt to, and they turn out badly.

Remember earlier when I mentioned you might not be getting the support you need from your manager because they are caught in administrative hell? I have seen organizations trickle that type of administrative work down to team leads. It results in team leads spending precious time each day on email, gathering stats, and sitting in unnecessary management meetings.

Why is this an issue? Because your job as a team lead is to help your team win. And sales is a tough job that often requires constant support. If it were the military, it would be like having a group of soldiers at war in the trenches and the team lead is like a sergeant whose only focus is leading the troops on specific missions and keeping everyone alive. The sergeant is not meant to deal with meetings, reports, or metrics. Those distractions would leave the group without a leader and get people killed. No, those tasks are done higher up the chain by people sitting in a command center overlooking the entire battlefield.

That is what your manager's manager should be doing. And as I mentioned earlier, your manager should be partly in that world but mostly on the battlefield with you and the other team leads, ensuring you have everything you need to succeed.

The second task often assigned to a team lead that should never be their *job* is the role of "bad cop." The bad cop in sales leadership disciplines the reps, holds performance meetings (usually about *not* performing), rolls out performance improvement plans, and deals with administrative issues (like incomplete timecards, time off requests, etc.).

All of that is important, but not generally seen as pleasant by salespeople. These tasks are all critical for running a professional sales operation, but they should never be among your tasks. When you do some or all of those, you become the bad cop in the reps' minds. But you should pretty much always (except on rare occasions) be the good cop.

Why is that so important? Because your reps need to know you are on their side at all times. Like the battlefield example, they need to know you are there to support them—again, unless they truly fall out of line or go against direct orders. They need to trust that when you come over to talk to them or try to help them, you are only there to be the good cop. If you ask a rep to meet with you, they should not be wondering if they are in trouble. If they can't trust you completely, at some point, they might stop turning you for help.

I have seen it happen so many times—a company makes team leads roll out performance improvement plans, etc. Then the reps see them as part team lead, part HR, part manager (meaning bad cop). And then the team leads have a hard time leading the team.

I am not saying you have to be in buddy-buddy mode, trying to be their friend, and only focusing on them liking you. But you cannot be the bad cop. And, truly, your manager has to be careful not just to roll out bad cop stuff to reps. HR should be handling HR stuff. Sales managers should balance good and bad cop modes and meetings. And you should, again, focus on being in the trenches with your team, fighting the same fight together.

Now, one final warning on this. The tendency, when team leads are focused on being the good cop and having the reps see them as a good person who is on their *team*, is a) the team lead crosses the line from *boss* to *friend*. Then it is tough to hold the reps accountable. And b) when this happens, I have seen team leads actually undermine what management and/or the company rolls out. When a new script comes out, or a new lead source, or a new sales tech is implemented, the team lead (and at times, the sales manager) will feel their loyalty is to the reps and they will end up siding with the team *against* management. Outwardly, or behind the scenes, they undermine the initiative, undermining its chance of a successful rollout.

Always remember who you work for. No, don't let your company make you the bad cop, but also remember you work for the company not your reps. Servant leadership is important as a team lead, supporting your reps in any way you can to help them succeed, but your loyalty should always be to your company first. (Sales managers erroneously directing their loyalty to their reps instead of their company is a topic for another book.)

COMPENSATION PLAN

All right, let's take a break from talking about lack of support, tools, and guidance, and talk about money for a few minutes. The relationship between compensation and a team leader's success might not seem obvious, but the compensation and rules your company put together will directly affect your focus.

Your goal is to do your job well and make more money, right? You did well as a salesperson, and your company said you can make even more money as a team lead, right? Hopefully, they meant it. But in reality, the various companies and compensation plans I have seen make achieving this goal more complicated.

When you become a team lead, you are responsible for supporting your team. You support your team in addition to maintaining your own sales goals. How do you divide your time and attention? What happens when you are on a call, working to close a deal, when a rep asks for help? And how much time can you spend coaching reps and still maintain your sales pipeline?

Being a team lead is a delicate balance between selling and supporting your team. The answer to these questions is found in your compensation plan or the rules handed down by your manager. The challenge, though, is the compensation plan outlines what you will earn when you sell *and* when you are leading your team. You can win at each—sales and leadership. But you can usually win *more* by focusing on one area over the other.

Let's look at an example using easy but made-up numbers.

You have a team of five reps, and you earn $10 for each deal they close. Before you became team lead, your reps as a group closed five deals per day. If you spend time helping them, and they improve to collectively closing ten deals per day, you will earn $100 on team sales.

You also earn $100 for each deal you close on your own. You regularly closed two deals a day before you were team lead.

How much effort will it take to help your reps *double* their sales? If you focus on helping them double their output and your sales drop to one per day, you go from earning $200 in sales to just $100, for a total of $200—$100 for your sale and $100 for the team's ten sales.

Or—and I see this a lot—you focus on closing your own deals, let the team mostly figure it out on their own, and end up earning $250 a day—the team's five deals and your two.

What's the incentive for focusing on bringing your team's numbers up?

WHAT TO DO ABOUT IT

This type of compensation plan has an obvious math problem. It is in the team lead's best interest to focus on their own sales. It's not about right or wrong. It's a result of the company's compensation plan. If they want team leads to focus on helping their teams, they pay leads more for the deals their team closes and less for the lead's own deals, which is incentive to pay more attention to your team's success than closing your own deals.

If the compensation plan is biased in favor of your own production, they are essentially saying: Do what you have been doing well, don't slow your production, and if you can guide the reps along the way, great. And if they struggle, well, that is also acceptable.

Even with a mostly balanced compensation plan, what happens is a new team lead will focus on their natural abilities. I have seen team leads who are natural coaches, trainers, and teachers than pure salespeople, and they spend their time helping their team, while putting little effort into their own sales pipeline. I have also seen the *salesperson* team lead who did the math and figured out they can make more by selling than leading, so they go all in on their own sales to maximize their income while their reps struggle and fail.

The best thing you can do is be self-aware enough to understand which focus you lean toward—selling or supporting. Examine the compensation plan and what your company expects from you (the rules). What does a successful team lead look like to them? What do they truly want from you? How can you win in this role and beyond?

The key is understanding what your company wants from you. Again, I have seen so many companies set up compensation plans without realizing they are incentivizing behaviors they don't want by building a pay model that leads to more [blank] instead of more [blank]). Once you know what the company wants, you can figure out how to win the game using their rules.

YOUR REPS

Now that we are done with our brief money-talk-interlude, let's get back to your team. This final section is about your sales reps. I have already covered self-awareness and how that leads to frustration with your reps when you are on autopilot and expect them to act, think, say, and be motivated by the same things that motivated you.

What else is there to talk about when it comes to your reps? How could they support or diminish your success as a team lead?

The first thing to look at is their transition from training onto your team. When they go from some type of training or "nesting" phase where they are trying to sell under specific, deliberate adult supervision that helps build their skills so they can leave the nest, what does that look like? Is there a structured playbook for bringing them onto your team and getting them up to speed?

The misguided assumption many companies make is that some training and nesting is enough to prepare a newly hired salesperson for the trials and tribulations of turning prospects into customers. They have the misguided notion that once baby reps get to you, the team lead, they should have the skills they need to fly solo and your involvement in their success will be minimal.

That, of course, is a huge mistake that leads to carnage on sales teams and usually ends in poor performance and avoidable turnover. In reality, that new salesperson needs a lot more nurturing and support to become competent and truly capable of flying on their own.

The second way reps can undermine your effectiveness as a team lead is relative to the team's makeup when you took over as lead. In your role as team lead, which involves some requirements to maintain your own production, you only have so much mental bandwidth to support your team with. As I mentioned in the compensation section, your plan and natural tendencies will determine where you spend most of your effort, which is, of course, driven by achieving your personal and financial goals.

You only have so much time and energy to help your team. If your team does not have a balance of proficient, seasoned reps and new or underperforming reps, you will find yourself drowning in requests that will undermine the whole team's production, including yours.

I have seen too many teams full of new reps who don't yet know all the ins and outs of the job—selling and "paperwork"—or an overabundance of failing reps who need additional support. You need to offset these reps with seasoned team members who require very little intervention.

Typically, a rep is promoted to team lead because there was a vacancy, and the rep was pretty good at their job. Sometimes, the vacancy comes from the previous team lead moving up and they are happy to help the new lead find their feet. But sometimes, the last lead fled and left you with something between a hot mess and a dumpster fire. Your company's leaders said, "We need more sales right away. The team needs to see how it's done. Who's the best closer we can put in there as team leader? If someone with a good sales record can't get the team back on track, who can?"

Then you got promoted. No team lead training. No on-site mentors—or any other kind, really. No team leader support group. Sink or swim, or pray your manager is extra smart and supportive.

Of course, it's possible you got promoted to be the team lead of an awesome group of reps and everything is going great. The company is growing and the previous team lead is working with a new wing on the org chart. But it's usually because the team needs help. It will most likely be a challenge that might involve five to eight reps, some or most of whom are underperforming. With most of your team being like baby birds who cannot survive on their own, you will need all the skills you can muster to bring the team up and produce yourself. It's just you feeding and caring for them, while still feeding and caring for yourself. This means you will have to choose who on the team will get enough attention and support and which ones will have to fend for themselves.

WHAT TO DO ABOUT IT

First, when newly trained reps join your team, the key is to work with their trainer and your manager on the transition. What guidance does the training offer? What support can the trainer give? What does your manager expect? Because, again, you have the rest of your team to deal with, plus maintaining your own production.

The challenge from the business perspective is that at some point the trainer will need to go train a new group, and you will be on your own.

Make sure you communicate your needs to your manager and request help as needed. The key is to get help and guidance before you have a problem. Managers may hear your request for help/guidance as a complaint if you wait until after you get newly-trained reps who aren't performing. It will seem like you are making excuses for underperforming. Being proactive and bringing up the need for help and support early, before you need it, looks very different.

It is important to talk to your manager about balancing your team, especially if you have the opportunity to do so when you are taking over the team. Sit down with your manager to look over your list of reps and their stats. Talk through each and establish expectations. As much as possible, be frank about your concerns regarding balancing your production with the needs of the team.

What does your manager expect you to do? How do they want you to prioritize? What do they see as the formula for success with respect to your time, energy, and effort? What results do they think are realistic? Is it even possible to have a needy group of reps *and* close your own deals?

Finally, how will your manager support you with the reps who need the most help, the ones who could/should be sent back to training (or maybe let go) and the ones on a personal improvement plan (PIP) where the help, coaching, and accountability they need might be beyond you?

CONCLUSION

I am fully aware that these are tough topics and you might not feel confident enough to bring them up with your manager or company leadership. You may hesitate to ask for the training, procedures, and support it will take for you and your new team to succeed.

These ideas/suggestions come easily for me because I've seen many team leads come and go. I've noted how the successful and unsuccessful alike did the job. I know if you can even do half of what I have outlined in this book, you will be way ahead of most team leads.

Honestly, if you implement some of the previous suggestions, you will find yourself winning as a team lead. The topics above might seem overwhelming, but remember, like anything else, a new job, task, project, etc. seems like a huge mountain to climb until you start climbing, one foot in front of the other.

The best suggestion I can give you is to read back through this book and highlight the ideas you think are either: a) the easiest to accomplish, or b) will make the biggest difference to your success. Focus on implementing that item (or a few items). Then go back through the book and find the next thing that would move the needle in your favor.

Just remember, the role of the team lead is like sales. At its core, a good salesperson is actually a leader to the prospect. They are helping them see what is possible, enrolling them in the mission (the product/service being offered), and moving them toward the finish line. When you can take that same process—that you might not have even realized you did from a leadership perspective—and apply that to your team, you will do well. The key is to remember everyone is different—and more importantly, they aren't you!

They might not be motivated by the same things that motivate you, say the same things during sales calls, care like you, or work as hard as you did (or in the same way); they might think you are not working hard enough, or believe you care enough. All of that is okay. Your mission as a team lead is to learn who each of your reps are and what motivates them, then support them in winning their own game—all while maintaining your own production.

When you get it right, you can make more money than you did as a rep, learn some great new management and leadership skills, and determine if you are cut out for bigger and better leadership positions.

You may find you don't like being in charge of other people and having your compensation, professional performance, and mental state tied to others' actions. You might ultimately realize you don't want to manage or lead. You want to go back to selling and having total control of your mental and financial state.

That is a great realization as well, if that is where you end up. I have had many reps who wanted to be team leads, only to find they didn't like it. We gracefully moved them back to sales, and they went back to crushing their goals and feeling happy with their role.

There is no right or wrong path. There is no good or bad outcome. There is just the path you are on, the outcome it leads to, and the lessons you take from it.

I hope this guide helps you make yourself into an amazing team lead, where you achieve your financial goals and lead a team to places they have never been. I hope it is the start of new career options. But most of all, I hope you find success at whatever fits who you are and what you want to achieve.

WORKSHEET

Many people think that because they are great at sales, they will be able to fill the Team Lead role just as easily. There is more to success in the Team Lead role that many realize. This is why I put together the New Team Lead Worksheet. If you would like to download a PDF version of this worksheet, go to www.sellingeffectiveness.com/guides.

DOWNLOAD NOW

NOW WHAT?

You are now armed with the main categories for success as a sales Team Lead. What now?

Like any new skill you read about and then want to apply, you need to take action to make it effective. Here are my suggested action steps for you to take before diving headfirst you're your Team Lead role.

1. Write out notes from what we covered in this book. Don't just read the book and assume you will get it all locked into usable memory—especially in the heat of battle.

2. Spend some time thinking about what you want your Team Lead role to be like and feel like. What does "success" look like to you? (And not just the $ part...but how you want it to feel, leading a team)

3. Put together the list of strengths, skills, abilities, and experiences you are bringing with you to the Team Lead role.

4. List out your "weaknesses", especially relative to what we covered in the categories here. Then rank them relative to what, when improved, would have the biggest positive impact on your results as a Team Lead (and any leadership role to come).

5. Write out a plan, resources needed, and timeline for each category you want to work on improving.

6. Share this list with someone you respect, that will also hold you accountable to taking action. Our minds don't like to stick with new routines (partly why most people don't make it to February without giving up on their New Year's Resolutions). So make sure to have someone keep you going in the direction you want to go

That might seem like a lot of effort/steps—it is. But if your goal is to be successful as a Team Lead, and long-term as a sales leader, it will be worth it.

If you need more resources, check out **www.sellingeffectiveness.com**, which you will find as a hub for lots of content, including:

- My books: *Selling With Authentic Persuasion: Transform from Order Taker to Quota Breaker*, and the other books in the *A Sales Consultant's Guide To:* series

- The podcasts: *Authentic Persuasion Show*, *Scalable Call Center Sales* show, and *Call Center Confidence with Cutter & Catt*

- My videos on the Youtube channel

- Where to follow me on social media

- The latest programs, workshops, and training I am putting on, and the events I am speaking at

Lastly, thank you! Lots of people talk about wanting to be successful in leadership roles. Many just want the money part, but don't realize what it takes. And so many are all talk and no action. By reading this book, and making it to the end, you have proven that you are different. I appreciate you for taking action. And I thank you for wanting to shift the way that sales leadership is done. For yourself and your team!

Jason

ABOUT JASON

Despite having a bachelor's degree in Marine Biology, working in tech support and government contracting roles, and not getting his first official sales job until age 27, Jason Cutter founded the Cutter Consulting Group, with a focus on coaching and training individuals, and being hired by companies around the world who want to dramatically improve their selling effectiveness. He is the author of *Selling With Authentic Persuasion: Transform from Order Taker to Quota Breaker*, and host of the Authentic Persuasion Show, the Scalable Call Center Sales podcast, and Call Center Confidence with Cutter & Catt.

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