



Sales Management Process

Joel Hackett, President QDOXS Long Beach California



Driving Growth

Who is: Joel Hackett

Education

- Graduated LBSU 1969 BA Communications
 - Lettered Varsity Baseball 1966, 1967, 1968
- MBA Management Pepperdine University 1975

Family

- Married to Diane
 - I have 2 daughters, Diane has 2 son's, & we have 2 step children, together we have 14 grandchildren

Work Highlights

- Jungle Cruise Operator Disneyland during College
- Xerox Corporation (7/1/69) 19.7 Years
 - #1 Sales Rep in United States 1971
 - Sales Trainer, Sales Planning Manager, Sales Manager, Major Account Sales Manager, Branch Sales Manager, Region Major Account Sales Manager, Region Federal Operations Manager, Region Major Account Contract Manager
 - Largest sale History of Xerox (six occasions), Negotiated signed first Xerox contract with Kinko's
 - President's Club winner 17 years
- Kontek Office Products 1989 – Konica Dealership
- Priority Office Products 1995 – RICOH Dealership
- Q Document Solutions (QDOXS) 1998 – Xerox Sales Agency
 - 16 years, 12> 100% of plan, 7 President's Club's, cum 15 year performance 101.5% of plan



Hole in One 2/12/14

Agency Structure



Diane & I AO's

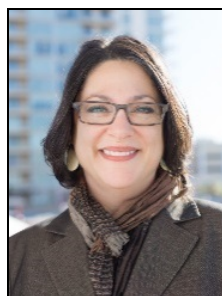
Sales Manager



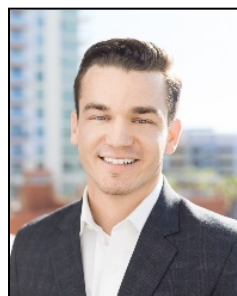
New Business



Analyst



Production



Office Resale



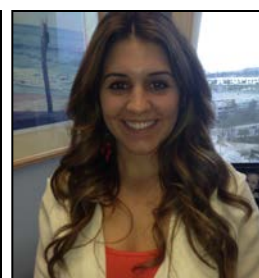
Office Supplies



MPS



Named Accounts



Account Executives +/-4,500 Est.

Sales Associates

Focus on New Business for Growth

New Business Dev. Rep.

- Inside Lead Generation
- Non-users only
 - Open Establishments
 - UCC-1 List
 - Competitive Est. List SF.com
- Hands Lead off to Account Executive
 - Should be incremental to Account Executive
- 10% commission when order closes
 - Tracks New Business Master Prospect List
- 14 orders 2015 \$155,400

Sales Associate (New Business)

- Outside lead generation
- Build sound selling habits of activities
- No equipment commission
- \$50 bonus when:
 - 125 Phone calls
 - 50 F2F calls
 - 50 Emails
 - 5 LinkedIn
 - 1 Blog subscriber
 - 1 QTip recording
 - 5-Info Competitive equipment
 - Model, Install date, expiration, P.M.

Our effort + UCC-1 = info 13,000 devices

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Foundation for Management

Establish a mutual Expectation

- **We use Income Planning**

- Arrive at an expectation for each engine related to income achievement

Establish Customized Activity Standards

- Based on:

- **Actual Individualize Selling ratios**

- That support income goals
- Focus on Value of prospect base
 - Relate total value of the prospect base
 - to amount closed each month
 - to the income earned vs planned

Activities + Skills = Prospects = Customers

Income Planner

2015 Rev. Tager	% of Target from this Engine	Gross Sales	Target TQR	Target Net Profit	Planned Commission	Base Commission Rate
\$1,000,000	89%	\$891,617	\$487,908	\$297,652	\$98,177	38%

Months	January-15	February-15	March-15	April-15	May-15	June-15	July-15	August-15	September-15	October-15	November-15	December-15
TQR	\$ 35,194	\$ 41,156	\$ 41,156	\$ 41,156	\$ 41,156	\$ 41,156	\$ 41,156	\$ 41,156	\$ 41,156	\$ 41,156	\$ 41,156	\$ 41,156
Gross sales	\$ 64,472	\$ 75,195	\$ 75,195	\$ 75,195	\$ 75,195	\$ 75,195	\$ 75,195	\$ 75,195	\$ 75,195	\$ 75,195	\$ 75,195	\$ 75,195
S. R. Commission	\$ 8,181	\$ 8,181	\$ 8,181	\$ 8,181	\$ 8,181	\$ 8,181	\$ 8,181	\$ 8,181	\$ 8,181	\$ 8,181	\$ 8,181	\$ 8,181
Total Earned	\$ 8,181	\$ 16,363	\$ 24,544	\$ 32,726	\$ 40,907	\$ 49,088	\$ 57,270	\$ 65,451	\$ 73,633	\$ 81,814	\$ 89,995	\$ 98,177

PAD Income & Activity Planner								Activities	New Proposals	New Prospects	Prospecting Calls
Scroll down and enter information for each month. If it is Green enter your info Everything else will calculate.								Ratios for one order	3	5	75

January									Activity Levels Required to support order rate	New Proposals	New Prospects	Prospecting Calls
Unit Calculation	0	1	0	2	0.5	1	4.5	TQR		13.5	22.5	337.5
Models	WC3655	7220	7835	7845	7970	5945	Total			\$ 193,415	\$ 322,358	
Selling Price	\$ -	\$ 8,247	\$ -	\$ 33,504	\$ 10,724	\$ 11,997	\$ 64,472	\$ 35,194	10/15 Lease Expirations	How many?	\$\$ Opportunity	P Opportunity
S. R. Commission	38%	\$ -	\$ 987	\$ -	\$ 4,511	\$ 1,357	\$ 1,326	\$ 8,181		4	\$80,000	\$24,000

Common Source of Information



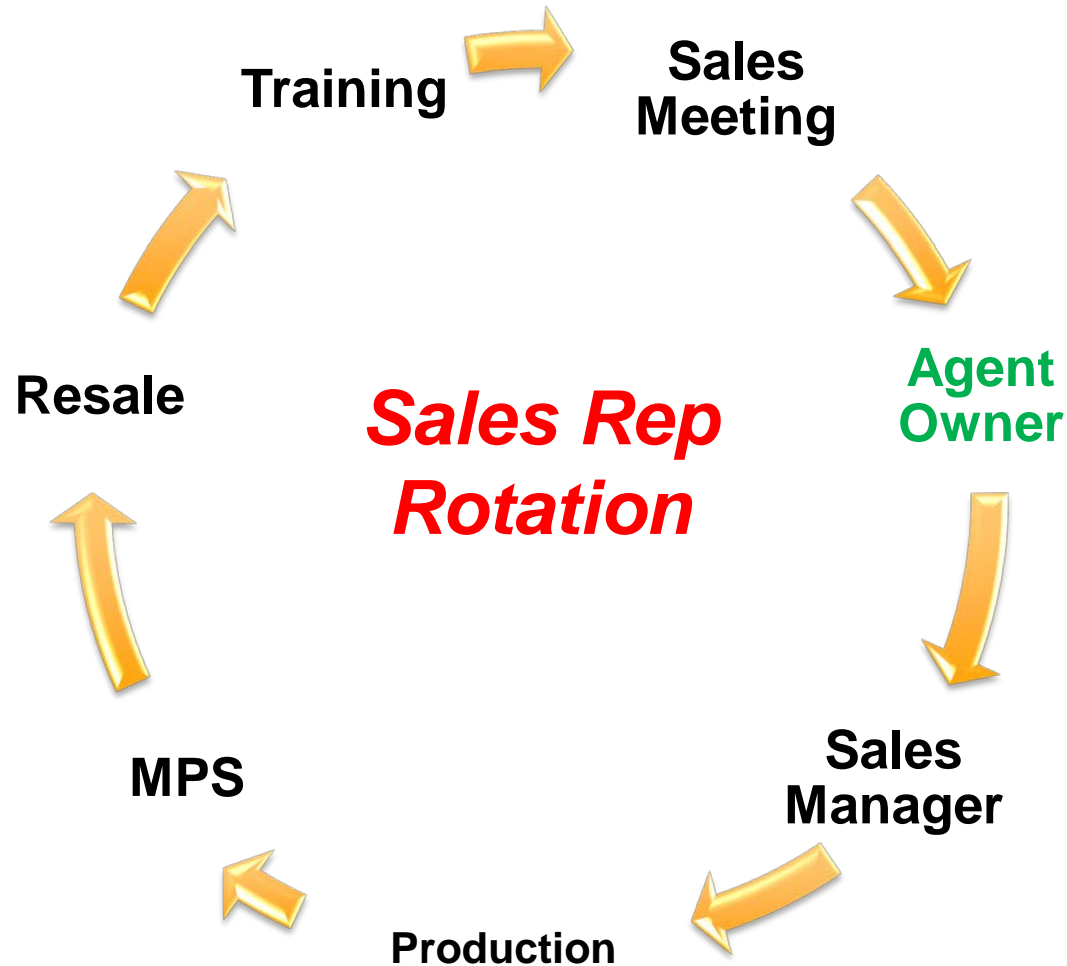
- **Everyone uses SF**
- **Everyone has an iPad**
- **Everyone's calendar is on SF**
- **All info is live**
- **Everyone & every action is interactive**

Segment Business into Measurable Buckets



Management Process

Monday MPL Rotation



Mission Statement

**Everyone
wins
Star Trip**

