



INSIDE SALES SPECIAL INTEREST GROUP CHARTER

Description of the Group

The Inside Sales Special Interest Group is a collaborative learning community for those with responsibility for managing inside sales* organizations to compare and discuss strategies, methods, processes and tools for optimizing the effectiveness and efficiency of the inside sales function. Over the course of several sessions, participants will engage in interactive discussions with peers at other companies on a range of topics (chosen by participants) in order to take away new ideas for improving the performance of their inside sales organizations by learning about the successful practices and experiences of other companies.

* For the purposes of this group, "inside sales" is defined as a team of sales professionals that interacts with customers primarily by telephone and/or other virtual channels (vs. calling on customers in the field) and whose primary function is to generate sales from new customers or grow/retain sales with existing customers.

Objectives

1. To provide a forum for collaborative learning through discussion of participants' experiences around organizing, managing and executing the inside sales function
2. To enable participants to glean new ideas for improving/enhancing the performance of their inside sales organizations by learning about the strategies, methods, processes and tools utilized by other companies
3. To facilitate participants' development of a network of inside sales manager peers at other companies that can be leveraged as a knowledge resource on an ongoing basis

Steering Committee

- Lynn Podoski, Director of National Teleservicing – Imperial Supplies
- Tom Fromm, Senior Regional Sales Director – InPro Corporation
- Zach Hockin, Inside Sales Manager – Master Lock
- Kate Johannesen, Inside Sales Manager – Snap-on

Intended Participants

- **Companies:** UW-EBC member companies with inside sales organizations. For purposes of this group, inside sales is defined as a team of sales professionals that interacts with customers primarily by telephone and/or other virtual channels (vs. calling on customers in the field) and whose primary function is to generate sales from new customers or grow/retain sales with existing customers.
- **Roles:** Managers of inside sales organizations; managers may also invite those with responsibility for other key aspects of inside sales team development and performance to accompanying them (e.g. training, compensation plan administration, etc.) when the discussion topic is relevant.

Potential Practice-Sharing Discussion Topics

(Actual topics to be decided upon by participant poll following the group's first meeting)

- Comparison of inside sales organizational structures, key roles and responsibilities of those roles
- Approaches to managing an inside sales team: managers' philosophies, success practices and lessons learned
- Performance metrics for inside sales (objective and subjective): Definitions, measurement methods and how they are used
- Inside sales rep compensation plan structures
- Talent recruiting strategies and practices
- New inside sales rep on-boarding and training models and practices
- Inside sales rep career-pathing models
- Tools/technologies utilized by inside sales teams
- Working with outside sales: Partnering and collaboration models and practices

Number of Meetings, Frequency, Length and Location

- It is anticipated that the group will meet 6-8 times over the course of 2015-16 (depends on # of topics selected in poll)
- Meetings will be scheduled approximately every 6-8 weeks
- Meetings will be from 9:30am-3:00pm
- Meetings will take place at UW-Madison