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About The Sales Management Association

The Sales Management Association (SMA) is a global professional association focused on sales management’s unique business and career issues. The SMA fosters a community of interest among member practitioners, sales force effectiveness thought-leaders and consultants, academics, and commercial sponsors across a broad range of industries.

Through training workshops, online resources, and research materials, The SMA addresses the management issues of greatest concern to practicing sales managers. The SMA’s focus areas include management leadership, sales force performance coaching, sales planning, sales process management, enabling technologies, incentive compensation, and sales force support.

Note to Members

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OVERVIEW

Properly managed, job descriptions are valuable tools for sales management. The benefits they provide include:

- Better recruiting, by focusing recruiting efforts on the right candidate competencies, while clearly communicating opportunity to applicants;
- More precise job definition and greater clarity around roles and responsibilities within the sales force;
- Supportive tools for mapping Sales Representatives’ career and skills development;
- Effective legal document that protects the firm from groundless employment complaints; and
- Compelling reinforcement of management's performance expectations for key jobs.

Unfortunately, job descriptions are too often viewed as administrative contrivances that offer little value to the sales manager. Where this is the case, sales management is often disconnected from the process of developing and managing sales-related job descriptions.

The Sales Management Association has compiled the following set of best practices to illustrate how high-performing sales management functions leverage job descriptions in their management efforts.
BEST PRACTICES IN JOB DESCRIPTION DESIGN

• Best Practice #1: Design before documenting.

Make sure you’re documenting properly designed sales jobs; i.e., jobs that provide efficient coverage of available opportunities and that are clearly aligned with company strategy.

Before jobs are documented with job descriptions, management must determine if the sales organization has the “right” jobs in place. The larger question of determining an optimal sales force deployment model and job design is beyond the scope of this note; for our purposes we’ll simply assume that management has successfully tackled the job design challenge. For additional resources on job design practices, members may wish to consult The Sales Management Association’s resources on this topic at www.salesmanagement.org.

• Best Practice #2: Partner with HR, but provide sufficient leadership to ensure job descriptions are relevant to the sales organization.

In other words, don’t outsource job definition development to HR in a turnkey fashion. High-performing sales organizations proactively manage the effort to define jobs and develop highly useful job descriptions. Their job descriptions often reflect the priorities, preferred processes, and current terminology used by sales management.

Best practice sales force job descriptions should include:

✓ The position’s expected impact on the firm’s preferred sales process.
✓ The customer, market, or industry segments that represent special focus areas for the position.
✓ The expected mix of selling activities or sales strategies.

The Sales Management Association’s “MAP” (Maintenance, Acquisition, and Penetration) offers one such model for organizing these kinds of priorities. For the human resources department, job descriptions provide a legal document useful for demonstrating (a) the firm’s compliance with specific legal requirements, such as the Americans with Disabilities Act (ADA), and (b) a lack of bias in the way job requirements are determined and, by extension, in the firm’s hiring practices. Progressive HR organizations also understand the business impact of effective job descriptions; but without sales management’s active collaboration, few HR professionals are attuned to sales management priorities to single-handedly drive truly effective job descriptions. Sales management should ensure job descriptions serve more than just a legal purpose by forcing the use of sales-focused content and priorities.

• Best Practice #3: Document the job – not the individual.

Job descriptions should reflect the objectives, outcomes, and activities of a well-designed position, regardless of who’s presently staffed.
It's tempting to write a job description (or even design a job) based on an individual's peculiar mix of strengths, preferences, and personality. Sound organizational design dictates that the job design and description process focus more generically on a job's characteristics, which are more lasting and better grounded in efficient resource allocation.

- **Best Practice #4: Describe outcomes, not just activities.**

Job descriptions should answer the question: "What are the two or three most important sales-related outcomes that the position will accomplish?" and not simply "What does this position do?"

**Ineffective:** The Sales Representative prepares proposals in response to customer inquiries.

**More Effective:** The Sales Representative achieves sales targets and maintains high levels of customer satisfaction within the assigned customer base by responding to customer requests and by anticipating customer needs. Important activities include preparing proposals, proactively gauging customers' requirements, and developing solutions from available offerings.

- **Best Practice #5: Collaborate with other stakeholders.**

When developing job descriptions, solicit insight from those departments and functions that must collaborate with the sales positions you’re attempting to describe.

Sales jobs frequently involve close collaboration with other functions and departments. By collaborating with other internal stakeholders when developing sales force job descriptions, sales management ensures there is a consistent definition of sales success within the firm.

- **Best Practice #6: Describe the characteristics of high performance – not just minimum performance.**

Define more than just the position's minimum requirements. Differentiate those KSAs that separate great performers from performers with minimally acceptable qualifications.

HR professionals typically precede job description development with an exercise called “job analysis.” Job analysis entails identifying the essential duties and requirements associated with a position, as well as the position’s working environment. This is sometimes done through written questionnaires or through interviews with management and job incumbents. A common outcome of job analysis is a set of “knowledge, skills, and abilities,” or KSAs required for the position. Used correctly, KSAs are helpful to sales management. Many job descriptions, however, simply list minimum requirements without attempting to differentiate those characteristics that separate high performers from minimally acceptable performers.

**Ineffective:** An Associate’s degree in business or a related field is required, with a minimum of two years of outside sales experience.
More effective: Minimally qualified candidates will have an Associate’s degree in business or a related field, and two years of outside sales experience. High performing Sales Representatives have the demonstrated ability to overcome obstacles, achieve sales goals, and articulate ideas clearly and concisely in a variety of settings.

- **Best Practice #7: Identify the critical judgments important to success in the position.**

Highlight in the job description important decisions that the sales position will make, which will critically impact job performance.

In the sales organization, truly critical knowledge, skills, and abilities often manifest themselves in important judgments made by the salesperson. For example: on a daily basis, many Sales Representatives must determine how best to allocate effort across a broad range of activities in order to maximize sales performance.

- **Best Practice #8: Keep job descriptions practical.**

If filled with obscure detail and an exhaustive catalog of routine activities, job descriptions will not help your sales force or sales management. The best job descriptions are short (no more than 1.5 to 2 pages), written clearly, and capable of accurately communicating the most important aspects of a job to someone unfamiliar with it. The most effective job descriptions do not attempt to capture every nuance and individual activity associated with the position.

- **Best Practice #9: Keep job descriptions up to date.**

Revisit job descriptions at least once per year to insure they accurately reflect the position as it evolves over time. Outdated job descriptions are often worse than no job descriptions at all. They provide conflicting direction, and can undermine management’s effort to deploy resources efficiently.
• **Best Practice #10: Integrate job descriptions into other management processes.**

Effective job descriptions will provide a definitive statement of a position’s objectives and performance expectations. As such, they’re useful for many management functions.

For example, themes covered in a Sales Representative’s performance or developmental review should resemble the themes present in their job description. If this isn’t the case, the firm’s job descriptions and/or performance evaluations are likely outdated, or there is a deficiency in job design. Similarly, training curriculum development should be focused on enhancing those skills outlined in job description. And many organizations use the job description as a recruiting tool, by adapting its language for use in classified advertising or job postings.

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**Sales Process Impact**

Which portions of the firm’s sales process will the position impact most directly? Including sales process impact in the job description provides added context on sellers’ roles and responsibilities.
Illustrative Job Description Format

Members may want to review sample sales, sales management, and sales support job descriptions available on The Sales Management Association website at this location: www.jobdescriptionslink.com.

What Not to Include:

Anything that can be construed as discriminatory on the basis of religious preference, race, age, sex, nationality, or physical or mental disability. This is illegal.

What to Include:

1. Title.

2. Position Overview. A brief summary (four to five sentences is best) that encapsulates essential responsibilities, selling focus, and performance expectations. It often includes information on reporting structure and degree of customer interaction. Concision and clarity are important in the position description. It may be easiest to write after all other sections are complete.

3. Job Responsibilities. This section should answer the question: “What will this individual do?” and “What is this individual responsible for accomplishing?” Where possible it is beneficial to include an estimate of time and effort allocation (e.g., 40% of selling time will be focused on new customer acquisition, 60% on existing customer retention).

Job descriptions should have no more than eight high-level categories of responsibilities (as few as five is preferable).

Consider providing detail regarding the following areas when developing job responsibilities for salespeople:

a) Which sales process steps is the position responsible for—either in a direct or supporting role? For example:
   • How does the position impact the buying decision?
   • Is it directly responsible for influencing a buyer’s decision? Or does it support others who are more directly involved with influencing buying decisions?

b) What is the position’s market, channel, and customer focus?
   • What sales and distribution channels is the individual responsible for? (e.g., Direct, Indirect, Combination)
   • In which market or customer segments will the individual focus? (e.g., Global Accounts, National Accounts, Major Accounts, Regional Accounts, SMB, SOHO, etc)
   • What is the individual’s preferred selling strategy? What are management’s expectations for how the individual should focus their effort across various available strategies? The Sales Management Association recommends adopting the MAP model, which separates unique selling strategies into the categories of Maintenance (existing customer retention), Acquisition (new customer development), and Penetration (existing customer growth).

b) What elements of the firm’s offering will the individual be responsible for? (e.g.,
what combination of products and services.) Will the individual serve as a
generalist, or as more of a specialist, focusing on a specific subset of the firm’s
products or services?

4. **Accountabilities and Performance Measures.** What must the individual
accomplish in order to be considered successful? This might involve quota
achievement, volume production, specific levels of activity, or market share goals.

This portion of the job description should address the individual’s direct and indirect
authority over others within the firm, and the related performance outcomes
associated with the subordinates’ or peers’ performance they are expected to
influence.

This is also an appropriate place to discuss developmental expectations and
milestones for the position. This might include training activities, certifications
desirable to secure while in the position, or other independent activities important
to the individual’s development.

5. **Organizational Alignment.** This portion of the job description places the individual
within the context of the organization. It should describe who the individual reports
to, both directly and indirectly, as well as which positions the individual has direct
and indirect management responsibility over. In addition, it’s useful to detail those
departments, individuals, or functions with which the individual will interact with
frequently, and with which the individual is expected to establish an important
productive working relationship.

6. **Qualifications.** Qualifications should detail minimum requirements, as well as
qualifications most desirable in top candidates or high performing incumbents.
These might include education, physical requirements, and Knowledge, Skills, and
Abilities (or KSAs). “Knowledge” includes content or process knowledge the
individual must have to perform; “Skills” represent desired proficiency level at
performing a task; and “Ability” applies more generally to an enduring capability
that a person possess. Knowledge and skills are typically acquired or learned
through training, and often indicate a desired level of effectiveness and efficiency;
ability may reflect more natural talents or dexterity, or potential to perform.

You may wish to discuss other characteristics deemed important to an individual’s
success in the position. These might include personality traits, such as motivation,
persistence, or work ethic; or required licenses or technical certifications. In this
section make clear what is essential and what may not be essential but
differentiates a great candidate (or incumbent) from others.

7. **Working Conditions.** This portion of the job description describes the position’s
physical location and working environment, and describes how much work is
required (including overtime if applicable). It’s appropriate to indicate particularly
challenging working conditions, such as deadline-intensive or physically demanding
environments.

8. **Salary and benefits.** There is no consensus view on whether it’s best to include
salary information in the job description; this is best left up to individual firms to
determine. However, at minimum you’ll want to describe any non-cash benefits
such as health coverage, pension, 401K, vacation benefits, etc.