
# Mastering Sales Triage: A Sales Leaderâ??s Guide to Boosting Team Performance

## Description



***Sales triage focuses on the top three areas that, if improved upon, will have the biggest impact on performance. Hereâ??s why performing a sales triage analysis on your direct reports, and your sales team as a whole, is critical in helping them to not only meet but exceed their goals.***

As a sales leader, your job can be summed up in one simple line: *to maximize the performance and potential of your direct reports and your sales team.* It sounds straightforward but anyone in your position knows itâ??s no easy task. How do you guide your direct reports to not just hit their goals but consistently exceed them?

The answer lies in **sales triage**, BDUâ??s proven methodology for identifying the areas that matter most, channeling your energy there and creating a clear path to success. By narrowing your focus to just three key areas for improvement, you can make a huge impact without overwhelming yourself or your team.

#### What is Sales Triage?

Sales triage is a simple but effective way to pinpoint the three areas in an individualâ??s sales process or teamâ??s performance that need the most attention. Think of it as a targeted approach to solving the biggest challenges that are holding your direct reports back.

Developed by BDU, this methodology gives sales leaders a framework for prioritizing efforts. Instead of trying to fix everything all at once, the key is to focus on the top three areas where improvement will have the greatest impact on overall success.

For example, letâ??s say you have an individual on your team who struggles most with closing deals, time management and prospecting. Rather than addressing all three in a scattershot way, sales triage will help you zero in on what aspect of each one will make the most difference right now. Once youâ??ve tackled those areas, you can move on to others with greater clarity and success.

#### Why Sales Triage Matters

Itâ??s easy for sales leaders to feel overwhelmed by the number of issues theyâ??re trying to solve. From coaching individual reps to optimizing the sales pipeline, thereâ??s no shortage of tasks demanding your attention. Sales triage helps you cut through the noise and focus on what will truly make a difference.

By identifying and addressing just three key areas, you can:

- Create a clear plan of action thatâ??s easy to follow.
- Avoid spreading yourself and your team too thin.
- Make a measurable impact on performance.

This approach is particularly valuable because it doesnâ??t require a complete overhaul of your or your teamâ??s processes. Instead, itâ??s about making focused adjustments that lead to meaningful results.



#### How Does Sales Triage Work?

Sales triage isnâ??t just about diagnosing problems; itâ??s about taking action. Once youâ??ve identified the three areas to focus on, you can then create a step-by-step plan to address them.

Hereâ??s how it works:

1. **Assess Your Teamâ??s Performance**
   Take stock of where each individual on your team currently stands. What are their strengths? Where are they falling short? Tools like BDUâ??s Triage Visual* can help guide you as you evaluate performance and identify gaps. (**Want a copy? Just contact us for a free download!*)
2. **Identify the Three Areas That Matter Most**
   Not all problems are created equal. The key is to focus on the areas that, if improved upon, will have the biggest impact on overall success. For example, if wasting time on tasks that arenâ??t producing results, a subset of time management, is a recurring issue, addressing it could free up hours for more productive activities.
3. **Develop a Plan to Close the Gaps**
   Once you know what to focus on, create a plan with specific steps for improvement. Set clear goals with measurable results, establish realistic timelines and track progress along the way.

#### Practical Example of Sales Triage in Action

Here is just one scenario of how a sales triage successfully played out in real life:

Several years ago, BDUâ??s CEO Lisa Peskin received a call from someone who had just purchased a company with a salesperson struggling to close deals. He wanted to send her to BDUâ??s two-day sales training program. However, Lisa had a thought: What if this is not a training issue? Instead of sending her all the way to Pennsylvania for training, she suggested digging a little deeper to find out what was really going on. She spoke with the salesperson and conducted a triage session. Hereâ??s what she found:

1. **She wasnâ??t setting defined next steps.**
   This salesperson had a habit of leaving follow-ups vague. When prospects said, â??Call me next week,â?• she would but then they often wouldnâ??t pick up. Lisa recommended setting specific next steps at the current step â?? i.e. making a set appointment for the next meeting â?? to ensure better follow-through and accountability on both sides.
2. **She launched into presentations without uncovering key information.**
   Instead of learning about the prospectâ??s wants and needs, this salesperson went straight into her pitch. Lisa suggested reordering her approach and beginning by first asking questions to uncover qualifying information, including the prospectâ??s pain points and goals. Sheâ??d then be able to customize her presentation to make it more relevant to their situation and offer specific solutions to help.
3. **She wasnâ??t clearly illustrating the value of her product.**
   This company was selling databases of physicians to hospitals for $18,000, and the salesperson was constantly facing rejection from prospects who did not see the value. Lisa taught her to ask two simple but important questions:
   â??How many openings do you have right now and for how many months?â?•
   â??What is the cost per month to have these open?â?•
   At the time, one opening a month was $100,000 in lost revenue. This meant that just two openings for two months would be $400,000. When the prospects did the math, it was eye-opening. By presenting her $18,000 solution in the context of a $400,000 problem, she could transform the perception of her productâ??s value into a bargain.



The results once she implemented just these three changes were extraordinary. She was the #1 performer for the first two quarters of the year and hit her annual quota by August. She also doubled her revenues the following year.

#### How to Implement Sales Triage Effectively

Performing a sales triage analysis doesnâ??t have to be time-consuming or complicated. Here are three steps to help you get started:

1. **Use Tools for Guidance, Such as BDUâ??s Triage Visual**
   This visual framework simplifies the process of identifying different types of performance gaps. Itâ??s an easy way to see where your teamâ??s challenges might lie and what to focus on first. (*Just contact us for a free download!*)
2. **Limit Your Focus to Just Three Areas**
   Itâ??s tempting to address everything at once but thatâ??s a recipe for burnout. Limiting your selection to just three areas helps you and your direct reports stay organized and focused.
3. **Involve Your Team**
   Sales triage isnâ??t something you do alone. Get your team involved by asking each person for their input and work together to identify both individual and team triage areas.

#### Need a Helping Hand?

We understand that learning and implementing a new methodology can seem daunting, and weâ??re here to help!

*Watch this quick video from Lisa as she briefly explains how our triage methodology works and how we can help you pinpoint the three areas that will make the biggest impact on your own or your teamâ??s performance.*

***(Video below not working? Click here to watch)***

**Contact Us!**

Enter your information below and weâ??ll reach out to set up a time for you to speak with BDUâ??s CEO Lisa Peskin. She specializes in guiding sales leaders through the triage process and can help you get started identifying the most pressing individual and team challenges, determining key areas of improvement and creating a plan to address each one effectively.

She will also bring to the table numerous resources, tools and real-life experiences to provide you with a proven, customized approach to tackling the improvement of key skills across your entire team. Whether itâ??s keeping the pipeline filled with qualified prospects, setting appointments, handling common objections or something else entirely, Lisa will help you make a big impact and see results.



Your Name (required)

Company Name (required)

Your Email (required)

Please Check All That Apply (required)

☐I would like a copy of BDU's Triage Visual☐I want to schedule a consultation to see if BDU's triage analysis is right for me☐Something else, and I'll let you know below

Additional Message

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**Category**

1. Sales
2. Sales Coaching
3. Sales Leadership

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