Sales Performance Management: concepts, approaches and measurement

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An explanatory overview of the management approach and software category, with references, an example and measurement limitations.

Meaning and different uses

Sales Performance Management (SPM) refers to the coordinated design of sales activities, processes and systems. Ventana Research describes this relationship in its 2020 research prospectus. The document outlines a research programme rather than reporting its final findings. [1]

Management approach and software category

SPM can describe either a management approach or supporting software. The software context includes territory, quota and compensation planning. [1] An application alone does not establish a viable sales strategy. Horváth's 2020 publication description focuses on setting, measuring and achieving sales objectives; it reflects a consulting and vendor perspective. [2] It does not establish a universally guaranteed benefit.

Outcome and behaviour measures

Anderson and Oliver's 1987 theoretical paper distinguishes outcome-based and behaviour-based salesforce control. [3] An original illustration contrasts revenue or margin with the completion of a defined customer-needs analysis. Simply counting conversations does not demonstrate their quality. A measure therefore needs to match the decision it is intended to inform.

A broader management approach

Pufahl's book connects strategy, organisation, controlling and people as management dimensions. [4] This is a particular approach, not a universal standard. An original application framework asks four questions: Which customers and needs are addressed? Who owns decisions and handovers? Which data makes progress observable? What capabilities do the people involved need? Answers may differ across channels and business models.

Illustrative application: examining the proposal process

Original, hypothetical example: a B2B team observes many proposals without clear customer feedback. It tests a routine within one segment: document decision criteria, stakeholder roles and a joint review meeting before sending a proposal. Initial measurement concerns adoption of the routine and customer responses. Outcome comparisons follow only after enough cases have closed. The experiment illustrates a learning process; it does not demonstrate a general revenue effect.

Measurement and limitations

Define the outcome, observation period, case selection and data collection before comparing results. A higher win rate could reflect easier-to-win customers rather than the new routine. Pricing, staffing or demand changes are possible alternative explanations. Analysing only closed opportunities omits long-running open cases. Incentive design also requires examination of whether a measure supports useful decisions or merely rewards improvement in the measure itself. These are methodological considerations, not findings attributed to the cited studies.

Distinction from CRM and sales controlling

CRM supports the design and documentation of customer relationships. Sales controlling provides planning and management information. SPM may connect these elements with organisational and people decisions. The terms are not mutually exclusive and their practical use varies. A definition should specify the activities under discussion rather than infer a complete management approach from a software product label.

References

[1] Ventana Research (2020): Sales Performance Management. Benchmark Research Program, Prospectus, p. 3. Research programme, not a findings report. Open-access PDF.

[2] Äckerle, M.; Lips, T.; Teufel, M. (2020): Sales Performance Management – Vertriebsziele setzen, messen und erreichen. Horváth / Anaplan, Point of View. Publication description; consulting and vendor perspective.

[3] Anderson, Erin; Oliver, Richard L. (1987): Perspectives on Behavior-Based versus Outcome-Based Salesforce Control Systems. Journal of Marketing, 51(4). DOI: 10.1177/002224298705100407. Open abstract; restricted full text.

[4] Pufahl, Mario (2018): Sales Performance Management: Exzellenz im Vertrieb mit ganzheitlichen Steuerungskonzepten. 2nd edition, Springer Gabler. Publisher page; paid book.

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