

ESSENTIAL SALES SKILLS: Sales Planning is Crucial to Making Your Sales Goals

Designing, Implementing, and Living Your “Battle Plan”— Part I of III

by Carolyn Merriman

The Basics: Why Plan?

The battle of Gettysburg started accidentally. And it was a mess. When the Yankees and the Confederates blundered into each other in southern Pennsylvania, neither side was ready for the battle that followed. No one had time to survey the landscape, position troops, and map out a foolproof military strategy. In three bloody days, thousands of soldiers were killed. When it was over, Robert E. Lee and his army limped back across the Potomac River, and the Civil War raged on for nearly two more years.

Now, making your sales goals may not be a matter of life or death—or as serious as war—but you’ll probably agree that you do *not* want to conduct your sales career like the battle of Gettysburg.

Wouldn’t you rather just make your goals? Be a hero? Come home to bands playing and flags waving? In other words, succeed? Of course you would. But remember: nothing ensures success like a successful battle plan.

Successful sales planning is something that professionals do. It denotes a level of expertise that separates you from the amateurs. It means you’re an officer instead of just an enlisted person. It keeps you from blundering into problems and then bleeding yourself dry trying to solve them.

But your sales plan does even more:

- It keeps you organized and on schedule.
- You can refer back to it to track a number of important tasks, like your follow-up to prospects. (Whom have you called? Do you need to call them again? If so, when? Whom do you still need to call? By when?) Keeping all these facts straight is very important.
- It also helps you track your own progress, whether you’re working alone or with a team, and (bonus!) as a result, it will make your sales meetings much more efficient.
- It will make you feel productive. It will help you to focus on the most important or valuable prospects and customers for your sales effort. It will help management evaluate and reward you, and will help you understand management’s strategic decisions more clearly. And your sales plan can keep you and your entire organization within budget, too.

Successful sales planning—your battle plan—not only makes you appear like a winner, you will actually *become* one. If you develop a good plan and follow it, you will serve your customer better, both during the sales process and after closing. You will also work better with your sales team colleagues.

You *will* succeed.

SALES PLANNING

Here are the Weapons in Your Arsenal

Your Goal

In a global sense, your ultimate goal is most likely to be a simple one: generate new business. But your specific goal for your sales plan could be, for example, to increase sales by 25% by the end of the fiscal year. Your organization's size, resources, its position in the market, and external factors such as the overall health of the economy determine its goals.

Your Objective

How will you reach that goal? This is your objective, Sample: Close 63% of likely prospects in order to achieve the 25% increase identified in your goal. (The specific percentages will depend upon the quality of your prospects.)

Your Strategy

Your strategy is the approach you use to fulfill your objective. For example, your strategy could be to propose the services or products that you know your customers need, even if *they* don't know it yet. Make them realize that they want what you have.

Your Tactics

Tactics are the methods you use in the actual implementation of the strategy. They can include (but aren't limited to):

- Conducting market research in your area to identify your customer base.
- Building a finely targeted, segmented prospect list according to predetermined criteria.
- Developing a work plan and timeline to map out your sales calls month-by-month and week-by-week.
- Scheduling appointments, doing follow-up, and developing a customer profile on each prospect to solidify your baseline information as you place calls.
- Establishing a tickler system to ensure that no prospect falls through the cracks.

The Crucial Parts of a Sales Plan

You may not have tanks, missiles, jeeps, ships, and planes. But when you craft your battle plan, you have other necessary weapons in your arsenal. First, though, you have to think tactically. Decide what your major milestones (i.e., projected sales revenues) are, and when you have to accomplish them. (You won't be invading countries, but you *will* be staking your claim to some very vital territory: your sales prospects.)

Once you identify your milestones and the date by which you wish to accomplish them—say, the end of the fiscal or calendar year—work backward from that date.

In fact, everything in your battle plan will be ruled by deadlines. This may seem obvious, but it's worth revisiting. Sales professionals who plan effectively don't just have their eye on the

final “drop dead” date. They thrive on meeting the multiple sub-deadlines (weekly, monthly, quarterly) that derive from the final, overall one. If you are able to discipline yourself to meet the deadlines in your plan, you will stay on track, with your goals well in sight.

Remember that your tactics will be key to your success. They are more important than strategy, because tactics exist at the ground level; they are the methods you employ “in the trenches” to get the job done. If they prove to be less than effective you can change them, and thus alter your strategy. As Harry Beckwith says in *Selling the Invisible*, “You can’t learn from your strategy. It’s just sitting there pretending it knows what it’s talking about, while your tactics are out there getting battle-tested by the market.”

The Big Question: What’s the Budget?

Wars are expensive. (Heck, *peace* is expensive!) And in effective sales planning, you’ve got to have the calculator handy. Responsible sales professionals will not only outline goals, objectives, strategies, and tactics, they also will be quick to ask the all-important question: What’s it going to cost?

However, budgeting is not scary. It’s logical. You can budget realistically and responsibly once you understand your sales revenue goals and the quality of your prospect list. Here’s how it works:

First, it’s wise to have a range of revenue goals. It doesn’t have to span the universe, but be prepared to live with a couple of different revenue outcomes. You definitely may want to close X number of sales, but if that is proven to be too ambitious, you would know it also would be acceptable to close Y number of sales. (Military analogy: we may not have captured Baghdad, but we did beat the Iraqi army.) You’re not lowering standards; you’re just giving yourself some wiggle room. In short, don’t set yourself up to fail. Then, build contingencies into your expense budgets based on that range of goals, making adjustments as you implement your plan over time.

When you determine your revenue goals and then budget your expenses accordingly, you essentially are forecasting what you think will happen in the coming year. How many units of your product/service will you sell? At what price? The answers will depend upon customer need, which in turn will depend upon patterns of consumption and market saturation (your research mentioned under “Tactics”) and the buyers’ sensitivity to your price.

Remember, too, that your numbers *will* be adjusted over time. You will not need to score 100% accuracy at the beginning, but neither should your numbers fluctuate wildly. You *are* budgeting responsibly; you’re just updating it continually as well. Be realistic, but at the same time be flexible, creative, and quick to respond.

So—take your revenue goals, your prospect list, your agreed-upon tactics, and forecast how much you think you and/or your sales staff will spend to close each sale. The key here: your prospects. Professional sales people budget and manage their expenses in a way that is specifically tailored to the available customer pool. Different prospects can require different tactics, which only you will know as you get to know them and their needs.

Line items in your expense budget can include:

- Printed & promotional materials:* Are you designing and printing a new brochure? Or will you reproduce that award winning annual report? Do your sales people all have the necessary business cards, note pads, and official stationery for personal follow-up notes? Will they give prospects small gifts, such as writing pens with your company name on them?
- Sales kits geared to the specific prospect:* These can include personalized appeals on company letterhead, charts and graphs, research downloaded from the Internet, biographies,

press releases, and clips. (These must be reproduced handsomely; don't just throw in crookedly photocopied or faded, hard-to-read newspaper articles.)

- Mail & delivery services:* Are you mailing that sales kit, handing it over in person, or will you have a messenger drop it off? Decide what approach is appropriate for whom. Then budget for everyone from the U.S. Post Office to your sales team's gasoline expenses to that bicycle messenger weaving in and out of downtown traffic.
- Presentation materials:* Will you make a formal presentation to your prospect(s)? If so, you could need posters, transparencies for overhead projectors, the projector itself, slides, videos, color photocopies, etc.
- Food & beverage:* Are you hosting your prospect(s) for breakfast, lunch, coffee, drinks, or dinner? Will you ask them to tour your office and set out soft drinks and cookies for them afterwards?
- Internet charges:* This is a vital tool for research and cultivation. (See "sales kits," above.)
- Laptop, pager, etc.:* The necessary tools and technology will keep you competitive.
- Long distance cell phone charges:* Not every prospect is around the block; some may be across town, across the country, or around the world.

Chickens, or Eggs?

Your battle plan and its budget will have a "chicken and egg" circular relationship. Don't worry, this is normal, healthy, and professional. That's because when you plan and budget, you forecast and predict. Then, as you put your plan into action, you soon will see what's working and what's not. In other words, you'll track and measure results, which will affect not only any contingencies in this year's plan, but also next year's, as you start the process all over again.



Making Your Sales Goals

Designing, Implementing, and Living Your "Battle Plan"— Part II of III

Living Your Plan

If you happened to be a general commanding troops in a war, would you develop a detailed plan for battle—and then leave it in your tent? Of course you wouldn't.

You shouldn't leave your sales plan on the drawing board, either. Don't let it languish in your file cabinet or in an unopened binder. It's not just a pretty picture you'll stick pushpins into for the duration of your "war." No, you've got to put it into action. You've got to live your plan.

Part 1 of this series "Sales Planning is Crucial" appeared in the summer issue of the *Tracker*. It showed you how to meet your goals by mapping out your sales strategy as if you were preparing for battle. Part 2 will show how you can live your plan. It will demonstrate how to translate the global sales plan you developed into a tactical territorial sales plan that addresses:

- Realities of your assigned prospect or customer pool
- Tactics to accomplish your objectives
- Selling cycle or timeframe under which you are working, which becomes your sales funnel

and means of forecasting

How to Create Your Tactical Sales Plan

Want to reach your sales goals? Your global sales plan can help you do it, but on a more universal scale—not “in the trenches,” which is where you must focus next. In your overall sales plan you should have included your goal, your objectives (how you were going to reach that goal), and your strategy (the approach you’ll use to fulfill your objectives). These elements, added to your budget/fiscal year information, will be the tools (weapons) you’ll need for the next step.

This territorial plan will include:

- Tactics (actual methods you will use to implement your strategy)
- Work plan (tasks you will perform as part of your tactics)
- Outline of your marketing support requirements
- Timeline

Important reminder: As we said in Part 1, your tactics are the key to your success. They are crucial because they are the methods you use at the ground level to get the job done. If they prove to be less than effective, you may alter them. In fact, think of your entire battle plan, whether it’s global or territorial, as a work in progress. Use your professional judgment and make changes along the way.

Who, What, How, When, Where, and Why?

- Who* are your prospects? You must identify and research them for the time period covered by your plan. Your first step: determine a deadline for when you need this research completed, and write it down on your work plan. Targeting prospects is interesting and engaging work. Give it careful and thorough consideration, because once you identify your prospects you must rank them. Ask yourself a variety of questions based on your market:

SAMPLE SALES & MARKETING ACTION PLAN
January 1, 2002 – December 31, 2002

| Goal | Objective | Strategy | Tactics/Action | Start Date (Fill in) | End Date (Fill in) | Responsible Party (Fill in) |
|------------------------------|---|--|---|-------------------------|-----------------------|--------------------------------|
| Close sale with XYZ Hospital | Create value in the minds of XYZ’s decision makers relative to the products we are offering | XYZ needs to refine a consultative sales approach to their services. | Seminar program for area businesses, to establish credibility and visibility. 1. Monthly quarterly program for business leaders, including XYZ decision makers. 2. Develop quality assurance tool to measure program results. Introduce products to position hospital. | | | |

- What* size employers should you target first? Often medium-sized ones are receptive because their decision-makers have the flexibility to experiment with service providers. But don't forget larger employers, to diversify both your target market and your sales cycle. (Diversity is important for several reasons. A balance of various-sized prospects will help you more efficiently manage the selling cycle, reach closure, and retain a consistent level of revenues and volumes.)
- What* other services can you offer prospects, to familiarize them with you and what you're selling (in short, to build your credibility with them before they make the ultimate purchase)?
- Where* do you have the most opportunity for business? Consider different categories of prospects. Your current or recent clients might have suggestions or recommendations. Check your local business directories, such as those prepared by local chambers of commerce or community service clubs. Consider special categories of companies that would be users of your products.

Other questions to answer can include: Are your targets primarily motivated to reduce costs or conserve cash flow? What typical problems and challenges do they have that your services can solve? What added value can you give to whom? And how?

After considering these variables, *how* will you rank your critical prospects? You can use the "A-B-C" system, with the "A" list being the "hottest" prospects that you should cultivate first. Ranking will require your personal and professional judgment and evaluation. It also may require you to identify the number of contacts and the amount of direct selling and/or marketing that you deem appropriate for each prospect and customer. (More on ranking in Part 3 of this series.)

But another crucial how question looms: *how* will you manage and categorize this information? (Categories of information to consider: current customers and strategies to retain them, how to increase your business through up- and cross-selling your current customers, and how to prevent information "leaks" once your system is established.)

This is where the prospect profile sheet comes in. Develop one on each prospect, and guard this information as if it were the Enigma code. A prospect profile sheet, whether on paper or kept electronically, is the most crucial weapon in your arsenal. It must include data on a potential buyer and also address such questions as:

- What* buying issues is this prospect concerned with at this time?
- What* are this prospect's priorities?
- What* is the timeline for this prospect's decision?
- Who* is the decision-maker?
- How* does this prospect make buying decisions?
- Once the prospect does decide to buy, *who* will implement the decision?

- Whose* services have they used in the past? *Why* are they considering a change?
- How* will they measure the success of the services you are offering?
Also, if your prospect profile is an automated one, make sure you report the results of each transaction you have:
- What was the original purpose of the call or the appointment?
- What was the outcome?
- What are the next steps? What's the deadline?
- What are the opportunities in terms of revenues and/or volumes?

Write your prospect profile in such detail that someone could come in tomorrow and pick up where you left off with no trouble. It's a complete history of every time you make contact. Whether you actually have a face-to-face appointment or just place a "thinking of you" phone call, record it on your prospect sheet with the date on which it took place.
How *you* engage each prospect in your tactical war?

How Will You Reach Your Prospects?

How will you engage each prospect in your tactical war? Identify the tactics that will be necessary to make each sale. In fact, you may want to make a separate work plan/timeline for every prospect and then combine them in a chronological order in one large document (your overall tactical plan). Or, rank your tactics using the "A-B-C" system or by task. The choice is yours. There is no right or wrong way to organize your information or plan.

However you organize your plan, first determine your form of contact for each prospect and write it down. This is a key question as you determine your strategies and approaches. For example, do you anticipate first meeting the prospect in person—say, when you both attend a conference? Or will a colleague, vendor, or another customer formally introduce you to the prospect? If not, will you first attempt to contact the prospect in writing?

If you contact the prospect in writing first, how will you do it? Will you send a letter with a full-blown proposal, or just a brochure? Or, will you send a breezy fax, postcard, or e-mail? If so, how many do you think you can send, and in what order? Finally, will you simply pick up the phone and call? If so, what will be your reason for calling?

A lot of strategizing is involved. You will probably use different approaches for different prospects. That's why developing a prospect list and its accompanying work plan takes a lot of careful thought and creativity.

What Else is in Your Arsenal?

"Sales is matching the customer's needs with something you have to offer that is of benefit to them." The best way to

When Will You "Strike?"

Identify a deadline by which you need to make each initial contact

Then, **just do it**—make that phone call, send that letter, secure that face-to-face introduction

But don't stop there. Assign deadlines to obtain sales calls and presentation appointments to all prospects as well.

achieve this is to develop trust and credibility. You'll not only need to know what you're talking about, you'll also need to know *the nature of your customer*. Otherwise, how will you know what to say when you contact them? How will you distinguish your services from the competition's? How will you make your prospects see how uniquely you can benefit them?

To answer these questions, the next step in your plan must be to develop a customer needs analysis. It will answer key questions about the prospect. Part 3 of this series will go into needs analyses in more detail, but questions it should answer can include:

- What are the prospect's current strengths?
- What are their facts and figures (sales volume, number of employees, locations, etc.)?
- Are there any major issues or opportunities facing this prospect right now?
- Who are the key people involved in addressing these?
- How do they prefer to work with an organization like ours? Look for standards and baseline satisfaction levels.

The Post-Battle Part of the Plan

Your tactical plan must include follow-up for every sales tactic you employ. Don't neglect this part of the plan, thinking that you'll fill it in later. This is crucial detail that can make or break a sale.

First, build a provision in your plan to send a follow-up letter right away to thank your prospect for meeting with you and to spell out what your next steps are. You also must build into your work plan provisions for any specific questions that came up during the sales call and that you think need follow-up. (This is not only something you're obligated to do, but it gives you another convenient opportunity to further differentiate yourself as a professional and to contact your prospects in the future.) So, build in a task to get those answers to the prospect by a specific deadline.

End Game

You must provide timelines for management of your sales funnel and/or selling cycle, and for such end game questions as:

- How long will you allow the prospect to decide?
- When will you need to resolve any stalling issues?
- When must you close your sale?
- If the sale does not go through, when will you re-approach? And how?
- What are your fallback options for the prospect to access your services (a mini-sale, a trial or sample)?

Post-Victory

Just because you've closed a sale, your work is by no means over. In fact, as Winston Churchill said, "It is not the end. It is only the end of the beginning." You have a customer now. You must continue to service and even cultivate them to keep them a customer for life, and your work plan must have provisions for this.

This part of the plan is known as supporting the sale. While you must remain focused on selling and not become preoccupied with service or delivery, remember that once a sale is closed you will be responsible for:

- Reinforcing your prospect's decision to buy.
- Developing a process to guide your new customer through the delivery.
- Managing your customer's problems and/or questions.
- Cultivating the relationship further, to lead to more sales opportunities.
- Some very simple, but effective, tactics you can use to accomplish this include:
 - Making follow-up calls regularly.
 - Asking for customer feedback, monitoring and reporting progress.
 - Anticipating concerns and expectations.
 - Becoming a resource for additional information.

The Ever-Changing Battle Plan

Now that your battle plan is complete, you need to be prepared to track your progress. You can make a wall calendar that corresponds with the major deadlines. That way, you or any member of your sales team can consult it to see what deadlines lie around the corner.

But you may also take advantage of some of the available computer software to provide yourself with an efficient, effective client contact management system. Software like ACT!, GoldMine, Sales Logic, or Telemagic can help you as the sales person track your planning, prospecting, forecasting, and client contacts. These applications can help you set and monitor your sales goals, create schedules, write and produce proposals, generate sales reports, and manage tickler files. They are off-the-shelf tools that can be customized to meet your specific needs. Even Microsoft® tools can help initiate the process.

Tracking your progress is important because a work plan and timeline is an ever-evolving document. As time passes and you meet or move your deadlines) and you may move some—things do happen, you will constantly be updating it as part of your progress assessment. But you know that there will be a final aim: meeting those annual sales goals. Or in terms of your battle plan: **WINNING THE WAR!**



OBJECTIVE: MAKE YOUR SALES GOALS

Designing, Implementing, and Living Your “Battle Plan”— Part III of III

Introduction

Since the first installment of our three-part series on “Make Your Sales Goals” went into print, the incredible events of September 11 occurred in New York, Pennsylvania and Washington. Therefore, now that we’re writing Part III a mere few weeks later, we feel a little self-conscious about using terms like “battle plan” and “win the war” when we talk about sales goals. Somehow, using warlike terms in even a vaguely light-hearted fashion seems, well... inappropriate.

However, if there is one thing among many that the terrorist attacks on our country have taught us, it’s not just the importance of keeping our lives in perspective, but also the importance of carrying on with them. That includes having confidence in the future, and continuing to pursue our professional goals and achieve success in a free and open society.

So, with a nod of respect to everyone affected by the events of September 11 (and that’s all of us, by the way), here is Part III — with a little less emphasis on battle plans and war.

A Quick Recap of Parts I and II

In Part I and Part II of this series, we discussed the importance of planning in making your sales goals. Planning is something that professionals do — it denotes a level of expertise that separates you from the amateurs. It keeps you organized and on schedule, and it helps you track progress. Finally, effective planning helps you be productive and able to meet goals.

We reviewed the crucial parts of a sales plan:

- Your Goal — for example, “Increase my sales by 25% this year.”
- Your Objective — “Achieve this 25% increase by closing 63% of ‘X.’”
- Your Strategy — the approach you use to achieve your objective.
- Your Tactics — the methods you use to implement your strategy.
- Your Budget — What will your revenue goals cost to achieve?

We also discussed the importance of creating a tactical sales plan — of customizing your global sales plan to accommodate your particular territory and prospect pool. We talked about prospect research — a crucial part of developing your territorial plan.

So, after reading Parts I and II of our series, you’re ready to go out and live your plan, right? Not yet! Although we’ve provided you with some crucial knowledge so far, you still need to focus on the equipment that you’ll need to achieve your goals — the tools (which we suggest) and the talent (yours, of course!).

The Tools

Prospect Development

Your territorial sales plan should detail your tactics, your work plan (the tasks you'll perform as part of your tactics), your marketing support requirements, and should include a timeline.

But in order to customize your plan to your territory, you need to know who your sales prospects are. That means you need to take some time to answer “Who, What, When, Where & Why” questions about every potential customer you have, so you can identify and rank each one. How? Through research, “intelligence” calls, and targeted sales calls. Those three methods will help you determine the answers to questions like: Who are your current customers and why? Who isn't a customer and why? Who are your prospects? Why are they a prospect – company size (number of employees, standard industry classification (SIC) code? Types of injuries and volumes? Needs within the organization to change access to healthcare, healthcare expenditures or enhancement to employee benefit packages? What are they most likely to buy and what can they add to their purchase over time? What will motivate each one to buy? What other services can you offer them to help them solve their problems and challenges? Where do you have the most opportunities for business? And so on.

Once you've identified your prospects from your research and calls, you must rank them to determine the best use of your valuable time. You may use any ranking system you prefer, but we find that the old reliable “A-B-C” system works just fine. Your “A” list, of course, is your list of “hottest” prospects that you should cultivate first, and you can set up subcategories using “pluses” and “minuses,” too. Create definitions for these categories such as; “A” = must have as a client, most potential for business (dollars and/or volumes), should have them in our backyard, or something political – prospect is on your hospital board, or is a large employer, etc.

NOTE: Be sure to ask for your internal staff and leadership's input and feedback when you rank prospects and customers. As a team you can agree upon the prospects and their ranking, share market information and, provide them with insights into the sales process.

While you'll want to cultivate the most promising prospects first, ranking also will help you decide your strategies — your approach. It will help you on such issues as: How much time will you spend on each potential prospect/customer? How will you contact them (in person? by letter? by phone?), and how many times? What form will those contacts take — will they be formal business meetings, or will you choose to encounter them in more of a community or social context? How will you evaluate the success of each contact's outcome? By answering these questions for time spent per ranking category, you will be able to determine the total number of potential prospects or customers upon whom you can call — per week, month, quarter and year.

The answers to these questions will serve as your beginning steps in initiating, developing and nurturing your relationships with your prospects — which is what selling is all about. If you can establish and build on these relationships, you eventually will have the credibility and trust to be able to move your prospects to “taste test” and, finally, commit to your product or service.

So, are you on sensory overload yet? Researching, ranking and strategizing requires gathering a LOT of information that you need to be able to use, refer back to, add to, and track. Which means that you need the right tools to manage it all. Excellent software is available to help you accomplish this, but we also can suggest the following useful forms.

The Company Profile/Action Plan Form helps you detail the name, type, key contacts, and other important information about a prospect, however it is ranked. The Prospect Qualification Matrix is a table you can use to finalize your rankings. Both can help you and your colleagues hold detailed, focused discussions during the research and ranking process.

Company Profile/Action Plan Form

Name/Address/Phone/Fax/website/email

Contact name/Title

Other Contacts/Titles

Company needs – (I = identified by them) (S = identified by you as opportunity) Prioritize needs in terms of timeline, dollars/volumes, acuity of need, etc.

Decision Maker (why, at what level, how involved in the buying decision, what will you do to include the decision maker in the process, politics, who is working for the decision maker who will implement or influence the decision?)

Budget/Timeline

Competitive information (if applicable – who, for what services, for how long, level of satisfaction, how can you distinguish yourself from them, etc.)

| <i>Date</i> | <i>Contact</i> | <i>Action plan/timeline for gaining account</i> | | |
|---------------|--------------------|---|--|--|
| <i>Status</i> | <i>Next Action</i> | <i>Responsible Party</i> | | |

| Prospect Qualification and Ranking Worksheet | | | | | | |
|---|---------------|------------------|------------------------|------------------|--------------------------------|----------------|
| <i>Revenue</i> | <i>Volume</i> | <i>SIC Code#</i> | <i>Miles to Clinic</i> | <i>Employees</i> | <i>Services</i> | <i>Ranking</i> |
| 45,000 | High | Manu | 1-5 | 500 | Injury Fee for Ser | A+ |
| 30,000 | High | Distr | 1-5 | 350 | Injury Rehab Fee for Ser | A+ |
| 15,000 | Med | Manu | 10-15 | 100 | Injury | B |
| 5,000 | Low | Print | 15+ | 25 | Injury | C |

Once you start using your prospect list, research materials and database in an organized fashion, keep them up to date and use them! They need to be accurate and secure, but they are no good if they're not timely and fresh. Which means that *any* time you contact a prospect or customer, note it on your profile form and, if it's in writing, put a copy in the file.

Making an automatic habit of using these planning tools helps you:

- Manage your sales plan — a *continuous* process in which you plot and refine your strategies, and develop and implement your objectives.
- Organize and use your available resources to meet your sales goals.
- Interpret and analyze prospect feedback in a timely manner.

Working your territorial sales plan

Now you can establish and cultivate your relationships. You're ready to learn more about your prospects' wants and needs, and eventually introduce your product or service to them. You're ready to ask for their valuable time so you can make presentations and/or prepare your proposals. In short, you're ready to implement your territorial sales plan.

Scary? Not if you know the nature of your prospects, which you already have a good start on because of your prospect research. But for your hottest prospects (the "A" list), you'll need to do a Prospect Needs Analysis. In Part II of this series we discussed the in-depth questions that a needs analysis raises, but you'll probably want to create your own template that asks questions like the following:

- What is the name and address of the Prospect Company? (Location can determine budget.)
- What is its business? What does it make or do? To whom does it sell? What are its annual sales? How many employees does it have?
- What are the company's needs? How can you supply them?
- What are the company's buying procedures? Does it buy from your competition? In what amounts, how often, and on what terms?
- Can you submit a plan that would save the Prospect Company time and money?
- What is the name and title of the person on whom you would call? What makes them the targeted "buyer?" What are their personal and business needs that are to be addressed through a purchase with you and your organization?
- Who else is involved in the buying decision, how, when and why? Have you a plan for connecting and selling to them? What are the politics, purchasing timelines etc.?
- Who are your competitors with this prospect for their business? And what benefits do they have to offer?
- How does your product or service compare with the competitors'?
- What do you sell that the Prospect Company needs?
- What benefits do you offer that will satisfy the company's needs?
- What opening remarks will you use to arouse the Prospect Company's interest?
- What questions will you ask the Prospect Company in order to further illustrate how your product or service can benefit them?

- ❑ What will you use to provide proof/documentation to support your sale?
- ❑ What major area of resistance do you anticipate? How will you answer them?

To make your contacts, you will need to outline your key points and develop scripts which help to put your presentation into a manageable, understandable and memorable form and to keep you “on message.” But just as when you were in the school play, scripts are meant to be behind the scenes, serving as prompts only. After you make a presentation, you must have a plan for follow up. Note the planned action and timeline in your action plan, and implement.

Now that we’ve discussed the tools you can use to develop and implement your plan, we’ll discuss the talent you’ll need to employ in the crucial phase: making the call itself.

The Talent: Making the Call

Getting Ready

Guess what? The first few times you contact, meet or sit down with a prospect, your purpose is NOT to sell. It’s to build a relationship.

Or, as Harry Beckwith wrote in *Selling the Invisible*, the most compelling message you can deliver is “I understand what you need.” The only way to do this is to get to know the prospect — through your research, ranking and strategizing, but also through your one-on-one interactions.

Which means that instead of doing most of the talking, you’re going to be asking a few well-chosen questions and, then, doing a whole lot of listening. In the 1980 film “Being There,” the reticent Chauncey Gardner is taken for a genius, because of how little he says. You can be a genius too, if you ask the right questions, listen to your prospect, and choose your responses with precision, economy and insight.

That’s not to say that you shouldn’t respond if the prospect indicates an immediate need. But in most cases you will be working to build confidence, loyalty and trust. If you don’t do this, you will be shortchanging yourself in the end. Transactional selling without devoting time to a long-term relationship will give you a quick sale, but NOT a solid foundation that you can build on in the future. Instead, concentrate on a deeper and wider relationship with your prospect/customer. You will want to get more business from them later and, of course, ask them for referrals.

So, be patient, and use the first few encounters to add to your Needs Analysis and to refine your strategies. Once you’ve established a relationship, use your own good judgment to determine when it’s right to ask for a business meeting and/or presentation.

When you get that meeting, go prepared. In case you’re tempted to say, “Well, duh,” think about that piece of advice for a minute. It doesn’t just mean to review your prospect profile, your needs analysis, your script, and every last statistic you can cram into your brain. It also means doing less obvious things. Like rounding up different colleagues and role-playing — Method acting, if you will. Using the various points of view of your staff to get into the mind of the customer. Determining what positive solution the prospect needs that you’re going to present them (as Beckwith says, “Selling *hope*”).

“Being there”

Once you’re in the door, remember to do the following:

- ❑ Conduct yourself in a balanced way: confidently but not aggressively. Give a firm but not crushing handshake. Make solid but not penetrating eye contact. Repeat people's names as they are introduced to you.
- ❑ Make sure your prospect can relate to you as a person. This means mastering the art of small (but not too small) talk. Start off with pleasant, personal conversation on safe topics. You are not just a selling machine. The weather, everyone's health, the art hanging in the prospect's lobby, the article you saw in that morning's paper about their employee who received an award... anything that seems natural, unforced and appropriate.
- ❑ After settling in and thanking the prospect again for his or her time, state the purpose of your visit without fanfare. Keep your statements succinct and to the point. Remember the Three P's: your Purpose for being there. The Process you will follow, to achieve the Payoff — that is, what they will get by giving you their valuable time. Your Payoff will be a part of them buying, of course!)
- ❑ Keep it simple. No fumbling with cumbersome flip charts or referencing arcane sources.
- ❑ Break your script down into memorable tag lines so that during your summation you can easily recap what you've presented.
- ❑ Speak in clear, direct English. Jargon intimidates people, or worse yet — turns them off.
- ❑ Focus on what you're saying.
- ❑ Be sincere. Part of this is a quality that's born in you, not taught. But part of it is also acting, and reacting, like a real human being. That means that you must respond to them naturally, answering their questions thoughtfully, and not just repeating a canned spiel. Be a person!

Conclusion

Well, now you really may be ready — to design, implement and live your sales plan.

There's no question about it — if you take the time as a professional to craft your sales plan, to really think through (and be willing to adjust) your strategies and budget... If you resolve to live your plan every day... respond to new realities... include your staff and leadership in the process... keep yourself open to being flexible and creative... and be willing to invest time in building trust and loyalty with your prospects and customers... **you will make your sales goals.**



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