

Making Your Sales Goals —Part II

Designing, Implementing, and Living Your “Battle Plan”

by Carolyn Merriman

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	End Date	Responsible Party
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 positioning 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.	(Fill in)	(Fill in)	(Fill in)

- 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 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 competitions? 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?

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.

- 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 lay 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!



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