
THE COMPLETE SALES PLANNER



SALES DIRECTIONS

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MANAGING SALES PRODUCTIVITY

Managing a sales team is a demanding job. Much of the time your people are working away from your direct observation and you are relying upon their professionalism and self organisation to manage their territory, locate sales opportunities and close them.

Unfortunately many sales people perceive that the job of selling is simply a process of building personal relationships with customers and delivering presentations about their products or services.

Sales productivity is maximised when the selling process is organised into a sequence of planned steps and managed in a disciplined way. Sales managers can maximise their value to the sales force by providing a sound sales planning structure and then managing its operation and implementation.

The tools provided in this “Complete Sales Planner” form a series of sales management planning and review tools through which you can structure your selling process. Through them you will be able to:

- Make your sales management task easier.
- Increase control over sales activity.
- Add value to your sales force’s thinking and strategy.
- Increase sales productivity.

PHILOSOPHY

The tools provided in this guide can be selected in combination to suit your selling process or be used individually to compliment planning and reporting processes that you already have in place.

They are designed to maximise discipline, minimise reporting and to provide key performance indicators (KPI’s) through which you can manage the selling process. Just as you use a speedometer and tachometer as KPI’s whilst driving your car, these tools form a similar function in your management of the sales force.

Each tool has been carefully designed and structured to keep it simple and maximise ease of use.

As you review them you will see that they:

- Combine scope for planning, monitoring and reporting using the one form. This reduces the need for repetitious filling in data and means that most forms can be used at each end of the planning cycle (for both planning and reporting).

- Follow a simple “fill in the box” style that minimises extensive writing and prose which most sales people find frustrating.
- Are based on many years of successful sales management experience
- Are built around a soundly based philosophy of the sales process.
- Are easily reproducible for your use with your sales team.

SALES PLANNING TOOLS

Each sales planning tool in this guide is outlined in the following way:

- 1 Description, purpose and philosophy - this section describes the sales planning tool and how it fits into the total sales management process.
- 2 Frequency of use - here, we outline the optimum frequency of use during the sales year or management cycle.
- 3 Complete instructions for its use by either yourself as sales manager, or by members of your sales force.

By purchasing this Complete Sales Planner, you are entitled to use or modify these tools within your organisation. We do not expect that they will always suit every need. In some cases modifications may be needed to suit an organisation's individual terminology or sales process.

Use these tools as a starting point. However, keep in mind four important principles that we have learned about developing sales planning tools in mind whenever you customise them:

- Avoid repetition – try to use the same form for planning, monitoring and reporting.
- Keep the form simple – try to provide a “fill in the box” format that eliminates the need for extensive writing.
- Focus on Key Performance Indicators (KPI's) – those basic and essential factors that act as indicators of sales effectiveness.
- Ensure that they follow the “flow” of the sales process and therefore support a systematic approach.

THE SELLING PROCESS

The diagram on the opposite page outlines the standard selling process around which we have based our sales planning tools. This process follows the steps through which most organisations will plan their sales effort in selling both new business as well as building continuing relationships with current customers.

You will see that the process starts with the business plan. Here the sales manager converts revenue targets into levels of planned activity. It then continues through each sales planning stage – territory plans, call plans, opportunity plans, account plans and then repeats the cycle with on-going territory management.

Each planning activity has its own frequency and is meant to be used at one of the following intervals:

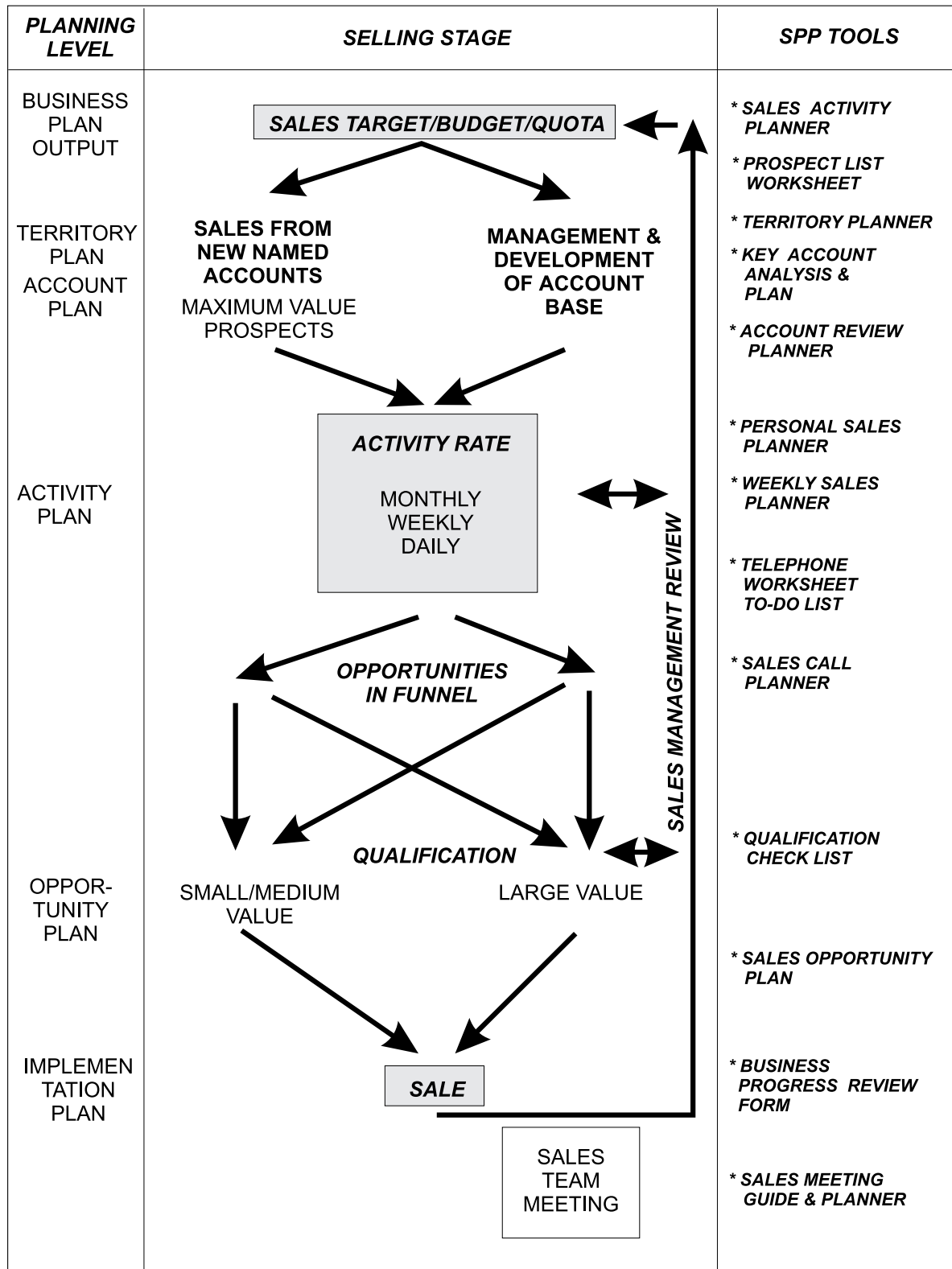
- annual,
- monthly,
- weekly or
- daily.

You may wish to vary these according to the dynamics of your market and customer base.



SALES PROCESS

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SALES ACTIVITY PLANNER

SALES PHILOSOPHY

Selling is a process of engaging in activities that bring in business to the company that is consistent with the company's business plan. The sales manager's task is to convert the business plan into activity. Sales activity can then be managed and directed towards achieving appropriate results.

PURPOSE

This territory planning tool is designed to create a structure through which sales representatives can identify the nature, scope and amount of activity necessary to achieve their sales target. It requires them to carefully think about their territory and customer base. Through it, they can forecast known business and create an activity plan for bridging the gap between known revenues and total sales budget or quota.

WHEN TO USE

This planner is designed to be used at any of the following time periods:

- At the beginning of the sales year
- On taking over a new territory
- As frequently as the dynamics of a changing territory require a review of activity levels required to achieve budget or quota

HOW TO USE

PART ONE - SALES FORECASTING

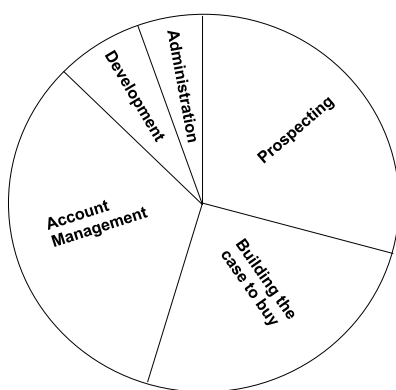
The first page of this planner requires sales people to identify the gap "between known revenues and required targets". It should be completed as follows:

1. Nominate the total sales budget or target for the planning period in the box provided at the top of the form. Should you differentiate new business from business with current customers, use the second box to define the target for current accounts.
2. The next step is to analyse the known revenue potential of major accounts by:
 - a. Forecasting revenue from major accounts
 - b. Aggregating total revenue from other accounts

Time Planner

TIME ALLOCATION

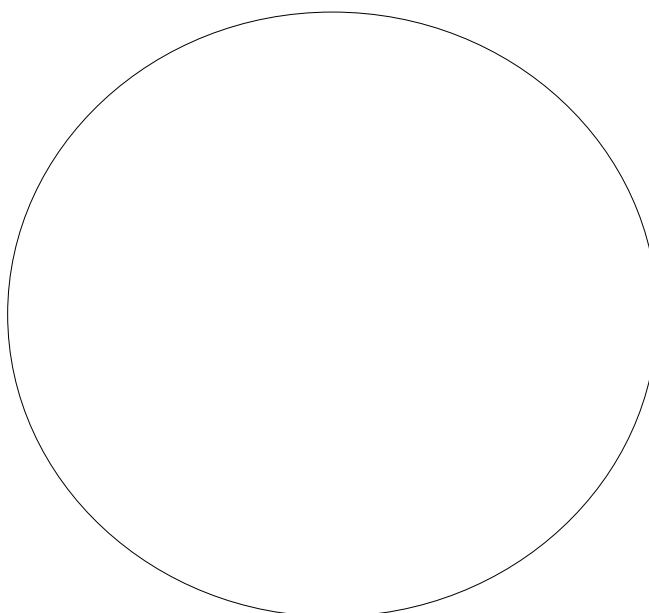
Plan the allocation of time that you will require to achieve your territory goals.
(Ensure that your allocation of priorities is consistent with your Activity Planner)



Sales Tasks typically include:

- Prospecting
- Building the case to buy (selling)
- Account management
- Business Development Tasks
- Administration

DEFINE YOUR TIME PRIORITIES



Sales Activity Planner

ACCOUNT BASE ACTIVITY		NEW BUSINESS ACTIVITY		TOTAL
CURRENT BUSINESS SALES GAP	\$ <input type="text"/>	NEW BUSINESS TARGET	\$ <input type="text"/>	\$ <input type="text"/>
TYPICAL SALES REVENUE PER DEAL	\$ <input type="text"/>	TYPICAL SALES REVENUE PER DEAL	\$ <input type="text"/>	
NUMBER OF SALES REQUIRED TO ACHIEVE SALES GAP	<input type="text"/>	NUMBER OF SALES REQUIRED TO ACHIEVE TARGET	<input type="text"/>	<input type="text"/>
NUMBER OF PROPOSALS	<input type="text"/>	NUMBER OF PROPOSALS	<input type="text"/>	<input type="text"/>
NUMBER OF PRESENTATIONS	<input type="text"/>	NUMBER OF PRESENTATIONS	<input type="text"/>	<input type="text"/>
NUMBER OF OPPORTUNITIES	<input type="text"/>	NUMBER OF PROSPECTS	<input type="text"/>	<input type="text"/>
APPROACH ACTIVITY REQUIREMENTS EACH WEEK	<input type="text"/>	APPROACH ACTIVITY REQUIREMENTS EACH WEEK	<input type="text"/>	<input type="text"/>

The top 20% of accounts generally contribute 80% of a sales rep's revenues. Assuming that a close relationship exists between a sales representative and current accounts, sales representatives should know enough about these customers to be able to forecast revenue on an individual account basis. They should already have enough information about each customer's business, buying plans, and potential changes to known and expected revenues. (If this level of information is not known, you could consider using the account planning tool as a means of formalising an account management discipline within your sales organisation).

Forecast general business revenues by:

- 1 Extending last year's trading results into a new forecast. This process should enable the sales person to identify the total known forecast revenues from current accounts.
- 2 Subtracting forecast revenues from current accounts to determine the size of the revenue gap remaining to be sold in the current account base.

Establish the target for new business in the box at the bottom of the form. These two figures represent the total business winning requirements for the sales representative for this period.

PART TWO - DEFINING SALES ACTIVITY

The second page of this planner requires the sales representative to convert dollar targets into activity targets. It uses an established sales planning method of working backwards from a goal to determine the activity levels required to achieve it.

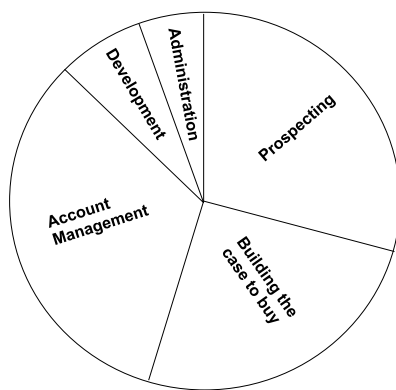
If you distinguish between account revenue and new business revenue use both columns, otherwise use only the most relevant column. Calculate sales activity rates through:

1. Determining the typical sales revenue per deal, sale, or account. This can be achieved by dividing the total revenue by the number of active trading accounts, or averaging the total of all invoices to determine the value of the average sale. Even if your order values have significant variation, remember that an average is still an average. Use it until you have developed a firm idea of the size of a typical sale.
2. Dividing the sales target by this amount to determine the number of sales required to achieve target.
3. Considering the individual representative's closing rate. Define the number of proposals, quotations or closes required to achieve the number of sales identified above.
4. Defining the number of presentations or demonstrations that will typically be required to position the number of proposals determined.

Time Planner

TIME ALLOCATION

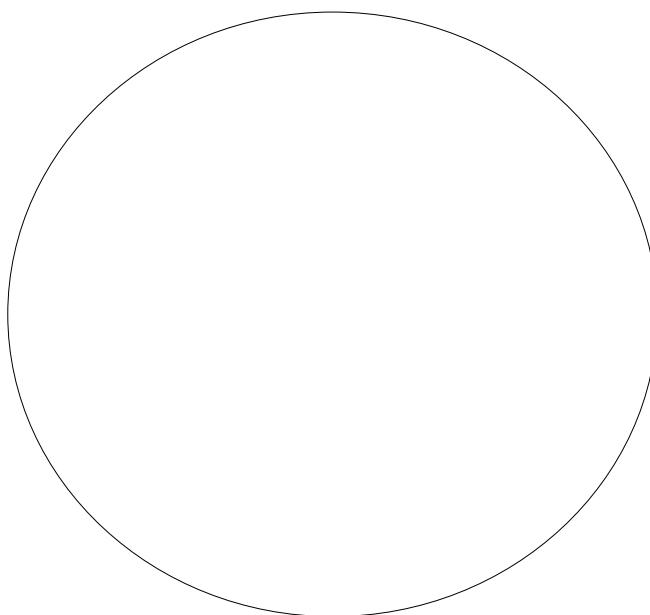
Plan the allocation of time that you will require to achieve your territory goals.
(Ensure that your allocation of priorities is consistent with your Activity Planner)



Sales Tasks typically include:

- Prospecting
- Building the case to buy (selling)
- Account management
- Business Development Tasks
- Administration

DEFINE YOUR TIME PRIORITIES



5. Decide the number of opportunities or prospects required to make that number of presentations?
6. Determine how many approach calls are required to produce a qualified prospect? This number represents the number of approaches required to achieve the sales target or bridge the sales revenue gap.

PART THREE - PLANNING TIME

Sales representatives have many tasks to perform in their territory. Typically these include:

- Prospecting,
- Selling or building the case to buy with qualified prospects,
- Managing their accounts,
- Being involved in business development tasks, such as attending trade shows, customer functions that will eventually, but not directly, create sales opportunities, and
- Administration reporting, training, etc.

Using the concept of a pie chart to symbolise the slices of selling time that are available each month, define the relative priority of each of these tasks. Check that the time allocated to each, especially prospecting and selling, is consistent with the approach targets already identified.

Activity Plan

X{

5

X

4.2

}

=

NO OF
QUALITY
CUSTOMER
CONTACTS
PER DAY

NO OF
DAYS PER
WEEK

NO OF
WEEKS PER
MONTH

TOTAL
CUSTOMER
CONTACTS
AVAILABLE
PER MONTH

USING THE RATIOS DEFINED IN THE TIME PLANNER, DEFINE THE NUMBER OF CONTACTS THAT SHOULD APPEAR IN YOUR MONTHLY PLANNER FOR EACH TYPE OF SELLING ACTIVITY

NOTE: The above formula allows at least one day per month for administration, sales meetings, training etc. Do not allow necessarily more time for non selling contact.

PROSPECTING CALLS

CALLS TO BUILD THE CASE TO BUY, PROMOTE
A PRODUCT, PROGRESS A SALE (SELLING)

CALLS TO MANAGE AN ACCOUNT

BUSINESS DEVELOPMENT ACTIVITIES

OTHER

PART FOUR - ACTIVITY PLAN

This plan now defines the number of contacts to be made per month in each part of the sales representative's job.

Define the number of customer contacts that the sales rep can realistically make each day. Using the formula to determine the total number of contacts available per month.

Based on the pie chart, determine the number of contacts that should be used as a standard activity rate for each part of the sales process.

SUMMARY

This tool has helped you to define the amount of business to be sold in a territory and then through an analysis of known sales performance statistics to define the number of sales opportunities required to achieve target. It has enabled you to manage time by defining the relative priority of each selling task and establish an activity plan for achieving sales results.

This planner is based on the sound philosophy that it is activity that achieves results. Your job as a sales manager to work with each sales person to define and manage sales activity.

PROSPECT LIST WORKSHEET

SALES PHILOSOPHY

Effective sales people create a prospecting list from which they plan a pattern of continuous sales activity to locate sales opportunities. Insufficient prospecting activity results in low levels of sales growth and lack of achievement.

By maintaining a prospect list and keeping it in a handy place, your sales representatives will significantly increase their level of sales productivity. Prospecting activity can be increased because details of prospects and target opportunities are now always available for use in those small periods of time that form part of a sales person's life (for example those ten minutes between appointments). A ready-reference list of names and telephone numbers makes it easy to make approach calls and follow-up previous activity.

PURPOSE

This tool is designed to provide a ready reference list of prospects to be approached or contacted.

WHEN TO USE

This worksheet should be used at a specified interval such as weekly or monthly, depending upon the dynamics and volatility of your sales environment. Where sales targets require high levels of prospecting this worksheet should be used more regularly.

HOW TO USE

In very few selling organisations is the ideal customer profile broad enough to include everyone as a potential customer or prospect. Therefore, sales people need to carefully define those characteristics that determine their "Maximum Value Prospects" (MVP's). These are the prospects that will provide the best sales opportunities for your products or services. As prospects are identified they can be compared against this criteria to ensure relevance and quality.

To identify your organisations MVP's, follow these steps:

- 1 With your sales team identify the characteristics of your best customers. (It is better to do this task together as a team will generally produce a higher quality output than will an individual). You may find a pattern of consistent factors such as those listed on the Prospect List Worksheet.
- 2 Similarly, compare the characteristics of your worst customers or most significant selling failures.

<i>Organisation</i>	<i>Contact</i>	<i>Address</i>	<i>Telephone</i>

<i>Organisation</i>	<i>Contact</i>	<i>Address</i>	<i>Telephone</i>

- 3 By comparing these sets of characteristics, you will be able to identify a profile of your MVP's – those organisations with whom you will do best and have the most sales success.
- 4 Sales people should maintain this list constantly. It should be updated weekly or on another appropriate regular frequency to record potential opportunities that the sales person has in their "sights".
- 5 As sales manager, you can audit both the number of prospects and the quality of prospects that appear on this prospect list as a way of providing both guidance and management control.

SUMMARY

Prospecting is the method through which sales people create leads and opportunities. Insufficient prospecting activity results in reduced revenue and failure to make sales targets or quotas. A ready reference tool that enables sales representatives to maintain a working prospect list is a real contributor to sales success.

TERRITORY PLANNER

SALES PHILOSOPHY

It is essential that sales people manage their territory strategically. A common problem is to try and provide all existing customers with the same level of attention.

In addition, sales people establish a calling pattern simply based on the size or value of an account. This approach ignores an important factor of the account – its potential for further penetration, growth or development.

Sales territories must therefore be managed in an intelligent way, taking into account both the revenue, or value, gained from current business and the potential of further business offered by the customer.

PURPOSE

This planner enables a sales representative to analyse the nature of their territory and plan for coverage relevant to the real needs. i.e. according to account value *and* potential. It will also help determine the strategic requirements of a sales territory by defining the nature and quality of the account base along with its strengths and weaknesses in relation to long-term success.

WHEN TO USE

This planner will be useful when:

- A sales representative takes over a new territory and needs plan his/her coverage of existing customers.
- Annually (or semi-annually in volatile circumstances) as part of annual sales and territory planning.
- You need to assess the value of existing accounts and their ability to provide on-going sustained revenue.

HOW TO USE

PART ONE - CURRENT ACCOUNT ANALYSIS

- 1 Establish a definition of value that suits your business. This may mean dollars of revenue, profitability or the strategic value of an account such as its importance as a reference site, user of strategic products or relationship value.
- 2 Establish a definition of potential. Potential may include further sales volume, revenues or product usage.



TERRITORY PLANNER

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Territory	Representative	Period
Submit to Sales Manager on or before third working day of the new period		
<p>CURRENT ACCOUNT ANALYSIS Plot the position of each account in the matrix</p>		

Using the graph on the first page of this planning tool, identify the relative position of each of the accounts within each individual's territory. Be careful to ensure that the rating is objective and realistic, otherwise the basic assumptions on which further analysis will take place will be incorrect.

To analyse the strategic requirements of a sales territory review the spread of prospects in each quadrant of the graph. Ask yourself these questions:

- "Does this spread best represent our ability to achieve sales goals?"
- "Are we spending the right amount of time with the right customers?"
- "Is there enough potential for growth in this territory?"
- "Are our most significant customers well managed and protected?"
- "Has this representative been prospecting intelligently?"

STRATEGIC TERRITORY PLAN

Consider the significance of each quadrant:

1. High Value / High Potential. These prospects should be contacted regularly and an account plan developed for maximising the potential. Sales calls with these customers should be directed to both consolidating the current position by integrating relationships with the complete set of stakeholders and by approaching identified sales opportunities with the sequence of selling steps that form your sales cycle.
2. Low Value / High Potential. These are the customers with whom you may currently do little business, but have considerable potential for growth and further penetration. Call on these customers frequently to identify their potential and increase product or service penetration. Where the opportunity is a large one use the Strategic Sales Opportunity Workbook (Complete Sales Planner - Volume 2) to carefully plan your selling approach.
3. High Value / Low Potential. These are the customers who are currently buying as much product or services as they require. Frequent calling on these customers is unnecessary, unless they are under competitive threat. Instead, use a variety of relationship contacts or methods to build a structured relationship (customer functions, new product announcements, some sales calls, newsletters, etc.) to maintain a relationship with the customer.
4. Low Value / Low Potential. These are probably your problem customers. It is inappropriate to call on these regularly and to use high value sales time when there will be little return. You may need to make some decisions about these customers: Should you keep them, could you be better servicing them through internal sales or telemarketing methods or maintain the relationship in as low a cost way as possible?

Customer Visit Schedule

<i>PRIORITY ONE</i>	<i>PRIORITY TWO</i>	<i>PRIORITY THREE</i>	<i>PRIORITY FOUR</i>
Most frequent contact Highest costs of sale Grow and Maintain	Frequent contact Invest sales expenses into the future Grow	Regular contact Maintenance costs Protect	Minimal contact Low relationship costs Retain? / Divest?
<i>Contact frequency</i>	<i>Contact frequency</i>	<i>Contact frequency</i>	<i>Contact frequency</i>

PART THREE - TERRITORY ACTION PLANNING

Considering the number, and type, of each customer use the second, or reverse, side of the worksheet to cluster your customers into different levels of priority. Determine a contact frequency for each level of customer (Half-Yearly, Quarterly, Monthly, Weekly, Daily etc.). Plan territory coverage in relation to that priority and ensure that it is consistent with the time demands of prospecting, business development and administration tasks.

Remember that a customer's relationship with you will change over time. An objective customer review will help you to maximise selling time and resources. Periodic review will help to ensure that your customer contact schedule is appropriate.

SUMMARY

Sales people have a finite amount of time to spend with customers. They should plan to spend most of this time in relation to the customers current value and future potential.

Periodic analysis of each customer will help to ensure that selling time is maximised and territory coverage is efficient an strategic. It will also help to determine the strategic strengths and weaknesses of your customer base.

ACCOUNT PLANNER

SALES PHILOSOPHY

Unless sales people have a plan for each major customer, they can easily fall into the trap of maintaining contact and building a relationship that isn't based on a firm direction. This leaves the seller in the situation of managing on a day-to-day basis or relying on ad-hoc activity to manage as best as they can.

By establishing a formal account plan, the seller-customer relationship can take on a purpose and direction that contributes to greater value for both parties. Account planning is a process that should be undertaken regularly. It need not apply to every account, but plans should certainly be created for every account that:

- 1 You cannot afford to lose,
- 2 Shows high potential for further sales growth and penetration.

Account planning is a specific sales discipline and is best implemented through a structured regimen of planned activity. Most organisations that follow an account planning methodology will implement a methodology something like this:

January

- Account SWOT analysis.
- Individual account budgeting.
- Strategic account plan and establishment of contact calling frequency.

April

- Quarterly review of major accounts and comparison against sales plan.
- Review of account file information.

June

- Half yearly review of major accounts and update/modifications to sales plans.
- Update strategy (if required) for each major account.
- Account file audit and update.

September

- Quarterly review of major accounts and comparison against sales plan.
- Review of account file information.



ACCOUNT PLANNER

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CUSTOMER					
ADDRESS					
TELEPHONE		FACSIMILE			
E-MAIL					
MAIN BUSINESS ACTIVITY					
NUMBER OF EMPLOYEES					
MAJOR CONTACTS					
NAME	POSITION		TELEPHONE		
ADDITIONAL CUSTOMER INFORMATION					
RESPONSIBLE SALES / ACCOUNT REPRESENTATIVE					
FILE CREATION		UPDATES			
		Date	By Whom	Date	By Whom
Date:					
By Whom:					

December

- Formal review of the years results from major accounts.
- Account file audit for information integrity.
- Forecasting of next year's sales for each major account.

This type regimen of activity ensures that account information is kept up to date. It assists to keep business plans current and that they reflect the real position with the customer.

WHEN TO USE

A good time to plan is at the beginning of the sales year, or when changes are taking place so dynamically as to demand a new plan or updated relationship. Account planning does not consist of one stand alone task. As illustrated in the schedule of activities described above, it is a series of structured analysis, review and planning activities that are all inter-related and ongoing.

HOW TO USE

This planner guides the sales person through a detailed analytical process and review of the account relationship.

You, as sales manager, can play an important role in facilitating this process. By acting as a mentor you can encourage the planning process and influence the quality of analysis and decision making.

Sales team workshops are an ideal way to undertake account planning. In this format the sales team will collectively undertake an analysis of an account and develop a plan. Workshopping contributes advantages through increasing perspectives and experiences that can be applied to account analysis and planning process. In many cases, sales people will rely on technical, operational or support people's contribution to the account. Involving them in the planning phase will increase ownership and commitment by the total team responsible for the business relationship with the customer.

Account plans are formal in nature and should always be documented. A written plan results in a more structured analysis, a more formal thought process and provides a basis for later review and evaluation.

Whilst the subject of account planning is worthy of a book in its own right, this account planning workbook should serve as a general format for identifying account potential and structuring product relationship and resource plans. Sales Directions can provide a strategic account planning process for accounts that are significant and strategic.

**ACCOUNT PLANNER**

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CUSTOMER					
ADDRESS					
TELEPHONE		FACSIMILE			
E-MAIL					
MAIN BUSINESS ACTIVITY					
NUMBER OF EMPLOYEES					
MAJOR CONTACTS					
NAME	POSITION		TELEPHONE		
ADDITIONAL CUSTOMER INFORMATION					
RESPONSIBLE SALES / ACCOUNT REPRESENTATIVE					
FILE CREATION		UPDATES			
		Date	By Whom	Date	By Whom
Date:					
By Whom:					

PART ONE - CUSTOMER INFORMATION

This first page of the account planning booklet should be used to record information about the customer. This information is displayed here for easy reference.

Most of this information, as for the rest of the planner, will need to be collected over time. In some cases, an account manager can meet with the customer to gain specific facts. However, in many cases, the collection of this information will be seen by the customer as impersonal.

Provision is also included for recording the history of the account plan, when it was created and records of updating. This will ensure that the plan is current and will assist people other than the sales rep to understand the planning progress.

Organisation Chart

Draw an organisation chart of the customer's business to include:

- * The business structure including subsidiaries and associated businesses*
- * Key decision makers and positions that influence your relationship*

PART TWO - ORGANISATION CHART

An organisation chart acts as a map of the customer's organisation. It is important to:

1. Understand the relative positions of the key people involved in the buying process.
2. Identify other areas within the organisation that may have similar needs.
3. Build a relationship plan with influential people.

On this second page, space is provided to either draw or include a copy of the customer's organisation chart. This should be updated every time the customer's organisation is changed or restructured.

Relationship History

PRODUCTS		
Product sold	\$ Value	Date

SERVICE RELATIONSHIP		
Service provided	\$ Value	Date

SPECIAL ISSUES / CONDITIONS		

PART THREE - RELATIONSHIP HISTORY

Future plans need to take past activity into account. Understanding the customer's current usage of products and services will help to define a perspective and a context on which future planning is based.

Some historical information for this section of the planner will come from your own accounting and / or customer records. These will help to define the customer's buying trends and product or service usage.

Use this page to record sufficient detail about the customer to establish an understanding of their buying patterns, product/service usage and special issues or conditions that apply.

Product/Service Usage Gap Analysis

LIST ALL APPLICATIONS / SERVICES REQUIRED AND/OR USED BY CUSTOMER	
LIST PRODUCTS WE, AND OUR COMPETITORS, SUPPLY	
	SUPPLIER ANALYSIS
Competitor 3	
Competitor 4	
Competitor 5	
BEST OPPORTUNITIES	

PART FOUR - PRODUCT/SERVICE USAGE GAP ANALYSIS

The starting point for future customer planning activity is to determine what products they use, by whom they are supplied and which products or services might provide better value for both you and the customer. This requires you to undertake an analysis similar to the sales survey that you perhaps completed during the initial stages of your sales relationship with the customer.

To complete the Gap Analysis, follow these steps:

- 1 Across the top of the grid, use your knowledge of the customer's business to list their needs in relation to your type of products or services. . For example, if you were an insurance company your customers may have a need for different types of insurance and financial services. These might include superannuation, property insurance, medical insurance, personal liability cover, car insurance etc. Keep this analysis at a broad level and use your understanding of the customer and their business to identify the range of needs that are relevant to your product and service. (Warning: Do not define products here. These will limit your thinking and create a narrow focus that inhibits your planning perspective)
- 2 Down the left hand side of the grid, identify which products or services the customer is currently using to meet these needs. Some needs may be met in multiple ways and others may not be currently met at all. Start with the products that you now supply.
- 3 In the supplier analysis section nominate your competitors or other suppliers. Using the codes, fill in the grid and identify which product or service from which supplier is currently being used to meet the customer's needs. In complex sales situations you may need to expand this grid to cover all applications, or alternatively, limit your analysis to the most significant needs and product usage.

The intention of this grid is to:

- Analyse which products and services the customer is currently using to meet their needs,
- Where there are gaps in your current product/service penetration levels
- Where additional products may provide better value to the customer.

Review your analysis to determine:

1. Where are there opportunities to sell further products against your competitors?
2. What needs may be unfilled that could be met by a product or service that you provide?
3. Where is the customer currently using a less efficient or inappropriate product to meet a need?

SWOT Analysis

STRATEGIC FACTOR	ANALYSIS OF CUSTOMER
STRENGTHS <i>Factors that enhance your influence and competitive position with this customer</i>	
WEAKNESSES <i>Factors that make you vulnerable with this customer</i>	
OPPORTUNITIES <i>Factors that result in further sales opportunities with this customer</i>	
THREATS <i>Factors that limit your sales opportunities with this customer</i>	

From this analysis identify three or four of the best opportunities on which to work with this customer during the life of the plan.

Eventually you may need to use an Sales Opportunity Planner and Qualifying Checklist to ensure that these opportunities are well managed in the selling process.

PART FIVE - 'SWOT' ANALYSIS

Your sales relationship with the customer does not exist in isolation. The nature of the total business environment, the level of competition and factors such technology will combine to create strengths and weaknesses in your relationship. You will need to plan how to capitalise on these strengths and minimise weaknesses in relation to your customer.

A 'SWOT' analysis will help you to determine your strategic position in relation to the customer. By thinking about your strengths, weaknesses, opportunities and threats you can now work more pro-actively in building your relationship and implementing your sales plans.

STRENGTHS & WEAKNESSES

Strengths and weaknesses are generally factors internal to your organisation that impact your ability to influence the customer.

- Strengths are those factors that enhance your influence and competitive position. They may include factors such as your size, location, technology, price, competitive advantages, relationship, and product range.
- Weaknesses and threats are factors that make you vulnerable with this customer.

They may include factors such as poor product or service fit, inadequate relationships, a history of complaints or poor service.

OPPORTUNITIES & THREATS

Opportunities and threats are external factors.

- Opportunities are factors that result in increased potential for business with this customer. They may include customer's growth, changing business needs or additional requirements.
- Threats are those factors that limit your sales opportunities. They may include preference for a competitor, key decision makers favouring another supplier, organisational change within the customer, changing technology, etc.

A significant part of your relationship plan will be based on this analysis. You will use the information from your SWOT analysis in the following ways:

- 1 Use a strength to overcome a weakness

Account Plan

<i>PRODUCTS / SERVICES</i>
<i>Define products / services which can be addressed or provided</i>
<i>RELATIONSHIP</i>
<i>Define relationships to be developed or expanded</i>
<i>INTERNAL</i>
<i>What resources will be required to support this customer</i>
<i>NEW</i>
<i>ADDITIONAL</i>

- 2 Use a strength to capitalise on an opportunity
- 3 Use a strength to overcome a weakness

By completing a 'SWOT' analysis you are considering your total position in relation to your customer and taking into account factors that you may have to manage or upon which you can capitalise in continuing to do business.

PART SIX - ACCOUNT PLAN

Your analysis so far should help you to identify the best opportunities for this customer and factors that contribute to your success, or impede your progress. An account plan consists of three components:

Products & Services

Which products should you be endeavouring to sell to this customer? What additional services can you provide? These should be based on the needs that you have identified from your gap analysis and qualified through your SWOT analysis.

Relationship

What plan should you make for extending the relationships that exist between your customer and your own company? Ultimately "people buy from people". Having the right network of relationships increases trust, confidence and influence. Consider with which influencers or stakeholders in the customer's organisation you should be developing and/or extending a relationships. With which people in your own company should the customer have additional contact or relationships? A plan to establish these relationships is as important as a product or service plan.

Internal Resources

What resources or requirements or product development will you need to develop within your own company to support this customer? Consider additional equipment, new processes, technology or other resources required for successfully achieving your plan.

Action Plan

<i>TASK</i>	<i>BY WHOM</i>	<i>BY WHEN</i>

PART SEVEN - ACTION PLAN

Whilst a broad plan creates direction, achievement can only result through actions. Your action plan should consist of a description of tasks to be performed during the implementation of your plan. It should also specify which people are responsible for that part of the implementation and which date each task should be completed.

Action plans should be specific, personally owned and dated.

Don't bother with good intentions. Record commitments only. Ensure that other people who are involved in contributing to action plans for this customer have a commitment to them.

SUMMARY

The Account Planning Workbook provides a structure for:

- 1 Recording account information
- 2 Analysing your relationship with them
- 3 Planning how to increase that relationship with future product, relationship and resource plans.

This process is best undertaken when integrated into a regimen of structured steps; each scheduled throughout the year to ensure complete analysis and quality of planning.

The quality of account plans is increased when planning is conducted in workshops involving sales, support and operational people who have an involvement in the account.

ACCOUNT REVIEW PLANNER

SALES PHILOSOPHY

Regular and formal account review meetings form a very powerful tool through which to manage your relationship with your major customers. They take the form of a specific meeting, planned and conducted annually or semi-annually, to review your overall relationship. Different from a normal sales meeting, account review meetings create an opportunity in which to examine your long-term relationship with the customer. They also form an opportunity to establish a direction and provide input to the account plan.

To work effectively account review meetings need to be dynamic and strategic. They should be conducted with senior members of the customer's organisation and are based on the philosophy that it is the relationship that matters, not clever tricks or sales tactics.

PURPOSE

There are many reasons why the customer should participate in a formal account review. These include:

1. Maximising their investment in your company and your products and services.
2. To create a joint plan to enable a partnership that matches their business objectives.
3. To renew and generate faith in your company and the benefits of doing business with you.

Account review meetings will help you:

1. Gain a better knowledge of the customer.
2. Identify opportunities for further business.
3. Increase customer trust and goodwill.
4. Determine opportunities for further business.
5. Forecast resources for adequately supporting the customer.

The account review meeting will generally follow the following agenda:

1. A review of the products and services you supply and the extent to which they are support, and are integrated, into the customer's business.
2. An outline of accomplishments and results provided by your company over the period under review. You should make these as specific and quantifiable as possible. A powerful way to help your customer understand your contribution to their business is to quantify product usage, savings, commitments, resources, outcomes, and the value that you have been able to provide.

3. A review of the customer's business goals and future direction. This should enable you to identify opportunities and threats to your relationship and can only be accomplished by conducting the review with senior management of the customer. In most cases routine buyers do not have sufficient knowledge of their own company's plans and direction to contribute to this level of partnership.
4. An analysis of expected developments by the customer over the next period.
5. Review and agreement on the quantity, scope and direction of required products or services for the next period.
6. Development of specific action items (consistent in format to those included in the account plan)

The formal account review is analogous to a performance review discussion. What has been the overall pattern of the customer relationship? What has the customer enjoyed or disliked about the relationship? Where is the relationship going?

WHEN TO USE

Annually, or six monthly, depending on your account relationship and its significance to your company.

HOW TO USE

The account review meeting planner contributes a structure through which this meeting can be managed. It will help account managers avoid a tendency to meet the customer and cover only superficial questions such as, "How are you going?" "Any problems?" "What else do you need?" "OK, I'll be back to see you next month."

To use the account review meeting planner the account manager firstly nominates the customer and date on which the meeting is planned.

The primary objective for the meeting should be written in full. In this way it forms a focus for the meeting. As the meeting continues, the objective remains obvious as a centering mechanism. This will minimise the probability for the meeting to wander away from the objective and into areas that are unimportant.

A number of tips for managing the meeting are included. These should be kept in mind throughout the entire meeting. They are based on common-sense fundamentals for making meetings effective.

Account Review Planner

PEOPLE CHANGES?

DEFINE FUTURE PLANS/NEEDS/REQUIREMENTS

AGREED ACTION PLANS

By whom?

By When?

Account Manager's Signature

Date

/ /

Prior to the meeting commencing, the account manager should make notes of key points to raise during the meeting. These should include:

1. A review of past performance.
2. Quantifying the value of current services or products.

By preparing these points in advance, the account manager can be ready for a strong opening to the meeting and be able to remind the customer of the value offered by the supplier.

During the meeting a discussion should be conducted to identify further sales opportunities. Opportunities are generally identified in these ways:

- Dissatisfaction. Where the customer is dissatisfied with products and services that they currently use.
- Regulatory or legal changes may mean that the customer has new requirements or needs.
- Technical changes that result in the need for updating or new processes.
- The need to increase performance.
- Needs that are expressed by the customer as problems or issues for improvement.
- New products that you may wish to introduce to the customer.

Use the planner as a scratch pad on which to record notes of people changes that affect your relationship. Include changes in both the customer's and your own organisation.

Review future plans, needs and requirements for products and services derived from the customer's growth or anticipated changes.

Record agreed action items for implementation as a result of the meeting.

Sign and date the planner as a record of the meeting and include the completed planner in the account file.

SUMMARY

In strong account relationships, both buyer and seller will see the need to build a working partnership that contributes value. The best partnerships are those in which both parties have a common vision for their relationship and put effort into planning how to work together.

This planner will assist the sales person to prepare for a strategic meeting with customer for whom this partnership is important. It guides the sales person through a process of ensuring that the customer perceives continuing value from the relationship and that specific plan are in place to solve problems and provide a direction for the future.

PERSONAL SALES PLANNING

Planned activity is always more productive than unplanned activity.

When sales people plan ahead and think about their sales activity in advance, they increase their sales productivity significantly. Unfortunately many of the management and sales reporting processes in common use only provide for an historical review of what has, or not, taken place.

As a sales manager, you will achieve your sales targets more productively when you encourage sales representatives to plan in advance. In this way you can ensure that activity will be in line with sales priorities and you will be able to provide coaching towards appropriate levels of activity. It is much better for you to correct inappropriate actions before they occur than after they have taken place.

Even without your review, planning in advance creates a disciplined approach for managing time and priorities. The total set of tools in this guide are based on the premise that selling is an organised and disciplined process. Planning in advance is simply a part of that sales discipline.

In some sales settings the nature of the sales cycle makes it appropriate to plan on a monthly basis. More frequent planning would not provide sufficient time for results to occur before they came under review. In others, where the sales cycle is shorter, it is more appropriate to develop weekly plans for selling and territory coverage.

The following tools provide a method for focusing on future activity. They consist of:

- 1 Monthly sales planner
- 2 Weekly sales planner.



MONTHLY SALES PLANNER

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Name			Territory			Month			
<p>Sales goals include:</p> <ul style="list-style-type: none"> Planned levels of contact with current customers Constant prospecting to identify new business opportunities Planning sales activities to convert identified opportunities into sales revenue 									
<p><i>This planner will assist sales representatives to work proactive sales activity that enhances results</i></p>									
<p>Complete the plan on or before the first business day of the month</p>									
<p>KEY SELLING EVENTS PLANNED <i>List prior to start of month</i></p>									
PERSONAL SALES CALLING PROGRAM			<p><i>List planned targets on or before the first working day. Enter dates as appointments confirmed, mark completion with a ✓</i></p>						
Individual/Company contact & number			Date	✓	Individual/Company contact & number			Date	✓
<p>Complete a sales call planner before each customer/prospect contact.</p>									

MONTHLY SALES PLANNER

PURPOSE

The monthly sales planner is a tool through which sales people involved in longer sales cycle processes can plan their monthly selling activities.

Modelled on popular planning and personal organiser formats, this tool enables the sales person to plan a month in advance. This ensures that their activities are sufficient to achieve sales targets. This planner acts as both a schedule and a method for personal evaluation of the current month's work. It is based on the philosophical assumption that sales result from activity –the more appropriate the activity, the more effective are the results.

WHEN TO USE

The planner should be completed prior to the month's commencement and reviewed at its conclusion. Additional activities can be added day by day as sales activity takes place. Action items can be transposed to successive planners for future months.

HOW TO USE

Professional sales activity normally includes some level of key event planning. Space is provided on the front page to list key selling events planned for the following month. This space could be used to record lunches, seminars, customer functions, presentations or project milestones that are significant to the selling process. Ensuring that sufficient activities are planned increases the probability of sales success.

Customer contact increases loyalty and sales outcomes. A personal sales calling program identifies customers, companies and telephone numbers which can be recorded for reference and contact throughout the month. This forms a ready reference prospect or contact list. By having this prominently displayed and available it increases the ease of making contact, especially in those short spaces of time between activities.

The centre section acts as a monthly planner:

- Dates can be inserted to suit the calendar for the month, and business development activities scheduled.
- The selling activity check list creates a structure for the range of selling events that should be included.
- A relationship activity check list provides suggestions for activities to include that will develop existing and potential customer relationships.



Enter planned sales calls, customer functions and other sales related events and activities in the planner. Include key sales functions, business development activities and events.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SELLING ACTIVITY CHECKLIST Monitor sales activity and results <input type="checkbox"/> Continually look for ways that you can increase you sales performance and productivity. <input type="checkbox"/> Call on current customers in accordance with established contact frequency plans <input type="checkbox"/> Ensure that prospecting activity is sufficient to achieve target sales objectives <input type="checkbox"/> Plan presentations that link to the prospect's business, needs and situation <input type="checkbox"/> Monitor key current proposals <input type="checkbox"/> Measure and monitor sales activity <input type="checkbox"/> Sales calls <input type="checkbox"/> Telephone activity <input type="checkbox"/> Proposals <input type="checkbox"/> Prepare and submit weekly/monthly sales reports <input type="checkbox"/> Attend weekly/monthly sales meetings <input type="checkbox"/> Carry out short term sales campaigns and competitions <input type="checkbox"/> Monitor cross-selling opportunities RELATIONSHIP ACTIVITY CHECKLIST <input type="checkbox"/> Customer functions/briefings <input type="checkbox"/> Client luncheons/briefings <input type="checkbox"/> Product based short sales programs <input type="checkbox"/> Selective mail-out and telephone follow-up <input type="checkbox"/> Telemarketing programmes <input type="checkbox"/> Circulation of technical information to key large accounts <input type="checkbox"/> Demonstrations & presentations <input type="checkbox"/> Networking events <input type="checkbox"/> Seminars <input type="checkbox"/> Remembering significant personal events
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Sales Planner

ACTIVITY TARGETS						MAJOR WINS		
	Actual	Plan	Last Month	% Plan	% Last Month	Customer	Product	\$
Sales meetings								
Joint management calls								
Customer functions								
Proposals Submitted								
Product presentations								
Prospecting contacts								
Other								
Enter targets on or before the first business day of the month								
FORWARD ACTIONS List follow-up and forward planned actions below								
Date	Contact					Action		

PHONE NUMBERS

The back page of the planner provides for a review of sales activity as well as a format for sales reporting. The completed planner can also be used as a form of activity report.

The first section on this page defines activity targets. This is provided so that the 'achievement oriented' sales person can plan the level of sales activities that they require to achieve their sales objectives. Planned targets should be entered prior to the commencement of the month. At month's end actual results and comparisons against targets and previous months can be made. The activities included in this section represent major selling activities and stages of the sales cycle.

Major wins can be recorded as they occur during the month. These form a ready reference record for more detailed sales reporting.

Forward actions can be recorded as the month progresses for inclusion in successive monthly planners.

Finally, space is provided for commonly used phone numbers as a ready reference.

SUMMARY

Planning activities in advance increases sales productivity. Use this planner when your sales cycle suits a monthly planning sequence and when you want to increase the level of advance planning by your sales team.

WEEKLY SALES PLANNER

PURPOSE

We know that planned activity is always more productive than unplanned activity. Sales result from both the number of activities in which sales people are engaged and the type of activities in which they are engaged.

The two fundamental rules of selling are these:

1. The '*fishing rule*'. This is based on the fact that the people who catch the most fish are the people who spend the most time fishing. Similarly, sales people who spend the most time selling are the people who make the most sales. The fishing rule prescribes that a certain, and defined, level of sales activity is required to achieve a specific sales target.
2. The '*moose rule*'. This states that "If you want to hunt moose then you have to go where the moose are". Your moose are probably in customer's offices, shops and factories. They are unlikely to be in your office or with low value prospects. Therefore, sales people need to position themselves in the right place. (See the section on the Prospect List Worksheet to review how to identify Maximum Value Prospects. These are the moose for your business).

Combining the moose rule and the fishing rule says: develop a required activity level and sell in the right places.

WHEN TO USE

Weekly in advance and supplemented day by day as sales activity takes place.

HOW TO USE

The weekly sales planner provides sales representatives with a format for planning their sales week. It also acts as an activity report and a tool through which you can evaluate a sales representative's performance. It should be prepared prior to the week commencing. You can review the planner with each sales representatives to ensure that future activity is in line with sales targets, territory priorities and sales plans.

For each day of the week each sales person should record:

1. The organisation on whom they intend to call.
2. The status of that person and as to whether they are a customer or a prospect.
3. The purpose of the visit. Is the scheduled call a prospecting call or is it a call related to selling, account management, customer service or another purpose?



WEEKLY SALES PLANNER

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Name				Territory		Week Ending / /	
Complete the first four columns prior to week commencing. Complete the "Outcome/Next Step column" at the conclusion of each customer contact							
Day	Organisation	Status	Purpose	Objective	Outcome/Next Step		
	Name/Contact	Customer or Prospect	Prospecting Selling Acct Mgt Service Call Other	Define your purpose in making this contact. Explain what you expect to accomplish	Describe the next steps or follow-up actions resulting from the meeting.		
MONDAY							
TUESDAY							
WEDNESDAY							

Weekly Sales Planner

Complete the first four columns prior to week commencing. Complete the "Outcome/next Step column" at the conclusion of each customer contact					
Day	Organisation	Status	Purpose	Objective	Outcome/ Next Step
	Name/Contact	Customer or Prospect	Prospecting Selling Acct Mgt Service Call Other	Define your purpose in making this contact. Explain what you expect to accomplish	Describe the next steps or follow-up actions resulting from the meeting.
THURSDAY					
FRIDAY					

ACTIVITY TARGETS					
	Actual	Plan	Last Week	% Plan	% Last Week
Sales calls					
Joint management calls					
Customer functions					
Proposals submitted					
Product presentations					
Prospecting calls					
Development activities					
Other					

4. The objective in making the call. Unless sales people have a clear objective, it is possible that their time with the customer is not optimised. In defining the objective of a call, sales people should outline exactly what they expect to accomplish as a result of the time spent with the prospect..

The final column 'Outcome/Next Step' is intended to be completed immediately after each call. By defining the outcome or the next step in the selling process, sales representatives are beginning to plan for following calls. It is not good intentions that create sales – it is action that progresses the sale from one step in the process to the next.

Prior to the week commencing, activity targets should be established and agreed with the sales manager. At week's end, actual activity can be compared to plan and success evaluated.

The completed planner becomes a simple sales report and may avoid the need for more verbose reports that are time-consuming to prepare. Whilst this report can be supplemented with additional information for reporting purposes, its main focus is on planning and managing activity - the basis of ultimate sales success.

SUMMARY

Planning activities in advance increases sales productivity. Use this planner when your sales cycle suits a weekly planning sequence and when you want to increase the level of advance planning by your sales team.

THE 'TO' DO' LIST AND TELEPHONE PLANNER

SALES PHILOSOPHY

Even at a daily or task level, the most productive people are those that have a planned approach to their work and manage it around clearly identified priorities.

PURPOSE

The humble 'To-Do' list has an important role in increasing sales productivity. Whilst territory planners, account planners, and monthly or weekly planners provide tools for macro level organisation, the 'to do' list helps individuals to structure and organise specific tasks each and every day.

WHEN TO USE

The 'To-Do' list should be kept in a folder or diary and used as a guide for sequencing tasks by the day.

HOW TO USE

TO-DO LIST

At a regular time each day, sales people should review what they are required to accomplish and plan those tasks that create their day's work. The two best times for this planning are either late in the afternoon / evening or first thing in the morning.

List all the tasks that need to be performed during the day.

Your tasks should not only be identified, but should also be prioritised. This is an important principle in effective time management. Unless tasks are prioritised, there is a temptation to spend too much time on low-value or unimportant tasks simply because they appear easy to do. Working, in the main, on low-level tasks also increases your level of frustration. At the end of the day it is easy to look and say, "I've done all this work, but what have I really accomplished?"

Prioritise every task by using an "A, B, C" system. "A" tasks are those which are critical and, whilst it may be difficult to find time to complete a major task, some section or chunk of the task can be completed as a contribution to the total task. "B" tasks are those that should be done and are high value tasks. "C" tasks are those that are low in priority and could be done if time permits.

**TELEPHONE CALL PLANNER**

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[illegible]



TO-DO LIST

[illegible]

Very rarely are all tasks of equal importance and time should be budgeted accordingly. Plan to spend most of your day doing "A" tasks.

As each task is completed, it can be marked off as finished.

TELEPHONE PLANNER

The reverse side of this tool provides space for maintaining a ready reference list of contacts and their telephone numbers .

Most sales people have frequently occurring small periods of time in which one or two telephone calls can be made. By keeping the list handy it is easier to maximise the contact rate, rather than spending time searching through telephone directories and using available time for preparation, rather than making an actual call.

SUMMARY

Working productively means managing time and priorities. The To-Do list helps you to focus on tasks that provide the greatest contribution to achieving sales goals. You can increase your productivity by using the telephone planner to maintain a ready reference list of those contacts that you must make each day.

SALES CALL PLANNER

SALES PHILOSOPHY

It is essential that sales people plan their calls effectively and record details of their contact for the account file and for future reference. Unless call planning is structured and organised, sales calls become unfocused and unproductive. At worst, the call becomes a 'coffee-cup call' where the sales representative meets with the customer, has a cup of coffee, and a pleasant chat. Six to eight 'coffee-cup calls' per day do not produce much in the way of sales results.

PURPOSE

This planner has two purposes. The first is to guide the sales person in planning to conduct a sales call. It prompts him/her to think about each part of the call to ensure that it is planned and structured. The second part acts as a note-pad on which to record details of the call. This develops an immediate call record and notes for later review, follow-up or filing on the customer file.

WHEN TO USE

The sales call planner should be completed prior to each customer contact. In the case of important sales calls, you will find it useful to review the call plan, discuss it with the representative and provide coaching whatever coaching may be necessary to achieve best results.

HOW TO USE

An effective method for planning a sales call one is based on the acronym 'POPS' – Purpose, Objective, Perception & Strategy.

PURPOSE

Being prepared for a customer contact means undertaking research and defining a purpose for the sales call. Effective sales people have a clearly defined purpose for each customer visit. (The purpose is a statement of why the sales call is taking place.) The sales call planner initially prompts the sales person to think about their purpose and necessary research before making the call.

The specific purpose of each sales call:

- Usually depends on the current stage of the selling cycle
- Defines the person(s) most able to contribute
- Defines the required relationship approach



SALES CALL PLANNER

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Plan your sales calls for all new business and existing customer calls

<i>Prospect/Contact</i>	<i>Position</i>	<i>Date</i>
PREPARATION <i>Work through this section prior to the sales call</i>		
RESEARCH <i>Special comment:</i>		
<i>Industry/Main business activity?</i>		
<i>Size/Turnover?</i>	<i>No. of employees</i>	
<i>Products manufactured or services provided?</i>		
<i>Current products used?</i>		
<i>Related needs?</i>		
<i>Last call/contact?</i>		
<i>Notes</i>		
PURPOSE <i>Why are you making this contact?</i>		
<input type="checkbox"/> <i>gather information</i> <input type="checkbox"/> <i>qualify an opportunity</i> <input type="checkbox"/> <i>deliver a presentation</i>		
<input type="checkbox"/> <i>continuing to build the case buy</i> <input type="checkbox"/> <i>make a proposal</i> <input type="checkbox"/> <i>close a deal</i>		
OBJECTIVE <i>What commitment are you seeking from the customer/prospect?</i>		
<i>What is the next step?</i>		
PROSPECT PERCEPTION <i>Why does the person think you are calling?</i>		
STRATEGY <i>How will you meet your objective?</i>		
<i>What is the prospect problem/opportunity you have identified?</i>		
<i>Does the prospect recognise the need?</i>		
<i>What product/service will provide a solution?</i>		
<i>What is the prospect benefit?</i>		
<i>How will you demonstrate this?</i>		
<i>How will you secure prospect commitment to the next step?</i>		

OBJECTIVE

Every call should also have an established objective. Whilst the purpose outlines the reason for visiting this customer, the objective states the desired outcome, in other words, the expected result of the meeting. The objective may change during the call, because of unseen customer circumstances, but should be clearly defined prior to the call commencing.

The objective statement:

- Defines the intended outcome(s) of the customer visit
- Leads to the next step in the selling relationship
- Forms a basis of self evaluation

PERCEPTION

The perception questions relate to our understanding of the customer's perception of the situation. They help to ensure that sales people have tried to put themselves in the customer's shoes and understand their perspective on the sales call, needs and relationship. People do things for their reasons, not ours so it is essential that some thought has gone into considering how the customer may see the situation. There are thousands of sales calls made each day in which the sales person has little, no idea of the customer's perception and point of view.

Some factors to consider about the customer are their:

Goals & Motives	Expectations
Financial position	Business philosophy
Problems	Personality & Style
Attitudes to problems	Alternatives
Priorities	Personal interests
Attitudes to you	Political or personal alignments

The strategy statement defines how the sales rep intends to achieve their objective. The planner prompts with key questions that help create a structure and process for the call.

A typical call structure will consist of these steps:

- 1 Attention statement to establish interest and confirm the purpose and objective
- 2 Rapport subject to break the ice
- 3 Planned questions to confirm our understanding or probe for information
- 4 The development of three or four key points that you want the prospect or customer to accept in order to achieve your objective.
- 5 A mutual call to action – agreed next steps for the next part of the relationship or sales process



RECORD OF PERSONAL CONTACT

PREPARATION		
Address		
Date	Time for call	Confirmed? <input type="checkbox"/>
Marketing and product brochures?	Done necessary calculations?	
NOTES		
CALL OBJECTIVE Write desired outcome in full: <div style="border: 1px solid black; height: 50px; margin-top: 5px;"></div>		
Concentrate	Listen actively	Note relevant details
Probing		
● What now?		
● What problems?		
Why?		
● What plans?		
● Competitors?		
● Decision process?		
● Buying criteria		
● Budget?		
ACTIONS / FOLLOW-UP		Leave your business card
DIAGNOSIS Did you meet your objective?		
Personal performance?		
Improvement needed?	Signature	
	Date / /	

File in customer file as a record of contact

RECORD OF PERSONAL CONTACT

Simple file notes are an important record of the ongoing relationship with your customers. Just as your doctor records details of each visit, so should sales people record details of customer contacts as part of an ongoing reference. The record of personal contact provides a scratch pad on which to note details of contacts already planned.

Preparation requires making an appointment and to prepare for the call. You will need to have marketing and product brochures ready, or perhaps prepare preliminary calculations of quantity and costing.

The call objective should be transferred to the shaded box towards the top of the form so that as the sales person can maintain a focus for the call. It is harder to get side-tracked when your objective is staring you right in the face.

Question prompts are provided to remind sales people of the critical questions to ask.

Actions and follow-up items can be recorded in this part of the form. Every sales call should conclude with an agreed mutual action.

This record also includes provision for personal diagnosis and evaluation of effectiveness. One way in which sales effectiveness can be enhanced is through review and analysis of personal effectiveness.

SUMMARY

A defined call plan using POPS as a structure will result in organised and productive sales calls. This tool stimulates a structured selling approach and provides a way of recording details of the visit in the form of simple call notes.

QUALIFICATION CHECK LIST

PHILOSOPHY

Successful sales people qualify completely and frequently throughout the entire sales cycle. Qualification helps them to understand exactly where they currently stand and to determine what additional steps will be necessary to close the sale.

Failure to qualify is one of the major causes of wasted time in selling. Because they perceive interest or receptivity, sales people can easily fall into the trap of committing time and resources to a non-existent opportunity. In more complex sales situations, sales people run the risk of spending time with low-level influencers and recommenders rather than with real decision makers. They may not understand the customer's real criteria and be try to present reasons to buy that are inconsistent with the real decision making process

Effective qualification reduces the impact of these time wasters and causes of frustration.

In the case of a simple sale, qualification means finding the answers to these four key questions:

1. Is the person with whom I have contact in a position to make a buying decision (authority)?
2. Do they have a need for my product or service?
3. Do they have sufficient money available to be able to afford it?
4. Would they buy from me if I were able to put up a sound case to buy?

In the case of more complex or strategic sales it is essential to qualify early in the process. An effective qualification process also leads into the development of a strategy for the sale. Each key qualifying criteria also forms a factor in determining what to include in the sales proposal, as well as when and to whom to present it.

PURPOSE

The CATWOMAN Qualification checklist provides a tool for sales people to constantly "take stock" of their position throughout the selling process and plan future steps that will be effective in closing the sale.

WHEN TO USE

Early in the process of selling each opportunity, and then constantly throughout the sales process.



QUALIFICATION CHECKLIST

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Organisation		Opportunity	Date
Complete before proceeding to the funnel stage of "Building the Case to Buy"			
FACTOR	KEY QUESTIONS	EVALUATION	✓/✗
C COMP- ETITION	Do we know who the competition is? Do we have a defined strategy for beating them?		
A ANSWER	Do we have a viable answer to their needs? Will it work? Has the prospect confirmed that our product/service meets their buying criteria?		
T TIME FRAME	Do we have clear understanding of the time table to a decision?		
W WORTH IT?	Is this a deal that we really want to commit resources to? Is it big enough? Is it strategic enough?		
O ONLY ME?	Has the customer confirmed that we have a unique component? Has the customer confirmed that this forms part of their decision criteria?		
M MONEY	Is their budget defined and approved? Does our solution fit their budget?		
A AUTHORITY	Do we have a clear understanding of the people and process involved in making the decision? Do we have ready access to them?		
N NEED	Is there a real imperative for this deal to happen? If not, can we create one? Is this a want or a real need?		

HOW TO USE

The CATWOMAN checklist provides a powerful method of analysis to determine the buyer's real buying perception. From these, you can plan future selling steps.

In most parts of this qualification and sales planning process it is essential that the sales person answer each key question from the *customer's perception* rather than their own. Ultimately the decision whether to choose your product, or one from a competitor, is a decision that the customer will make for their own reasons; not yours. You need to ensure that your sales people's strategy is consistent with the customer's perception of their reality.

In the initial selling phases, sales representatives should use the CATWOMAN questions to identify the number of factors that they can confidently assess as qualified. Your role as sales manager, is to review this analysis, adding objectivity and a management perspective. You may decide that a certain number of factors, or set of factors, need to be answered positively before further selling time and resources should be committed to the opportunity.

In order for a customer to be 'qualified' an appropriate number (generally five out of the eight CATWOMAN questions) should be able to be answered affirmatively. It may not be time to submit your proposal until you can answer a larger number (perhaps seven out of the eight questions). Where less than this number of positive answers can be established, you must consider carefully as to whether you are really ready to close the prospect.

Your sales strategy for each opportunity will emanate from this analysis. Where a key question is unanswerable, more information must be learned. Where a question is answered negatively, then a strategy must be developed to convert that issue into a positive response. When all eight questions can be answered positively then you can assume that the sale has been made.

For each CATWOMAN factor, consider the following issues:

- **Competition** -this is important to understand. Without knowing the customer's alternatives it is difficult to create a competitive proposal. Unless you know who the competitor is, how can you sell against them? The key qualification point here is whether you can develop a plan for beating the competition from your customer's perception.
- **Answer** - Does the customer perceive that your product or service is capable of meeting their needs? Unless this is the case, why would they be prepared to buy? If the customer has not told you that your solution, product or service is appropriate then a significant part of your selling strategy will be to convince them that it is.
- **Timeframe** - The customer's decision timeframe is important from two perspectives. Knowing when they are planning to buy will help you decide whether you have sufficient time in which to develop a sales campaign leading to an effective pro-

posal. Secondly, if the customer has no specific timeframe in mind, there may be no reason to consider a proposal. It may be necessary for you to create and manage a timeframe over which your series of selling steps will take place.

- **Worth It** - Is this business that you really want? Does it suit your core competencies? Will it be profitable? Is it worth the sales effort?
- **Only Me** - This question relates to your ability to differentiate your product or service. Unless the customer or prospect can see some way in which your product is different from others, it may be just as easy to buy a product that is perceived to provide the same results from somewhere else. Be careful that you don't try to use a differentiator unless it forms part of the customer's buying criteria. Some education or persuasion may be necessary for your customer to include that criteria in their decision process.
- **Money** - Has the customer confirmed that they can afford your product or service? If price is an issue you will certainly encounter objections and your sale may be doomed from the start. When selling capital equipment, additional issues here relate to questions such as: Has money already been budgeted? Can it be obtained from somewhere else? Is this a new budget or a replacement? Unless the customer has sufficient money to spend they will not be able to buy your product or service.
- **Authority** - Are you in contact with all the people who really have the authority to make a buying decision? Do you understand the decision process? How can you learn more about the buying process and gain access to the real decision makers?
- **Need** - This question focuses on the differences between a want and a need. Unless there is a real imperative for a decision to be made, you may find that it is hard to close the sale. In this type of case the process may drag on for an indeterminate time. Part of your selling strategy should be to determine how you can increase the need for your product or service. What business argument or case can you establish that increases the importance of a buying decision taking place?

SUMMARY

This checklist should be used throughout the selling cycle. Early in the sale it can be used for initial qualification and in later stages of the selling cycle for re-qualification and continued strategy development. Close when you have ultimately convinced the customer of all CATWOMAN issues.

MONTHLY BUSINESS DEVELOPMENT REVIEW

SALES PHILOSOPHY

The sales funnel is a good method for illustrating the steps through which a sales opportunity must be worked when the selling process is long and complex.

The funnel is broad at the top to represent the idea that a larger number of prospective opportunities are required in order to results in a smaller number of final sales that will emerge from the bottom of the funnel.

As the sales opportunity is managed down through the funnel it will pass through a series of filters or stages of the sales process. Each filter represents an evaluation point at which the opportunity must be reviewed assessed and to ensure that it is appropriate to proceed with the next stage of the sales process. Effective sales people understand the relative position of each sales opportunity and manage each step of the sale.

The main stages of the funnel are:

Contacted

When personal contact has taken place with an individual in the prospect organisation who is responsible for, or involved in, a possible use of our products or services.

Qualified

When we believe there is a reasonable chance to do business with this customer on this opportunity at a mutual gain.

Developed

When the prospect is convinced that action is warranted abnd that our product/service is appropriate.

Closed

When the customer is convinced that our solution is best and is the one they want.

Completed

When our service or product has been installed and is producing results to the customer's satisfaction.

The sales opportunity funnel has some important uses in the sales planning and review process:

- It forms a model of the steps to winning a complex sale. By using a model, sales people are able to control the process and manage each step. They know at which stage the sale is currently positioned and the selling tasks that are required to be completed at that, and future stages of the process.
- It provides a format through which the progress of sales opportunities can be tracked, monitored and reviewed. In this way it forms a basis for monthly sales reporting.

As a sales manager you'll be able to identify whether opportunities are being managed effectively by looking for:

- 1 **A full funnel.** When the funnel is full of opportunities, you can be confident that the sales person is conducting sufficient activity to achieve sales targets. A funnel with insufficient prospects suggests that the sales person is not active enough in identifying and creating sales opportunities. However, a funnel which is too full may be a sign that the sales person has too many opportunities to be able to give each one proper attention.
- 2 **A flowing funnel.** In a simple sales environment an easy way to evaluate a sales person's effectiveness is by their 'closing ratio'. (The number of sales that result from the total number of customer calls made). In the case of complex and longer-term sales, a close ratio is not a very effective method of evaluation. A sales person may meet with a number of prospects each day but not close any business. This does not mean that they are a poor sales person - it probably means that they are in the early phases of a sale and have a lot of work to do before the customer is ready to buy. The key indicator of success in complex selling is the extent to which they are able to progress the sales opportunity down the funnel. Through monitoring the continuing progress of each opportunity in the funnel you will be able to determine whether the sales person is managing their prospects towards an effective close.
- 3 **Reasonable attrition.** It is unlikely that many sales people will win every sale. Probably only a proportion of initial opportunities will result in eventual sales revenue. (That is why a funnel is a good model of the selling process. - it is broad at the top in order to collect a large number of opportunities and narrow at the neck to represent specific sales). An indicator of successful selling is when the attrition rate of opportunities within the funnel is within reasonable expectations for your product or service.

You can use the funnel as a simple sales reporting tool. Used in this way it makes it easy to visualise the amount of progress being made. A graphical image has more impact than text. It is easier to see patterns and relative progress. The monthly sales review incorporates the sales funnel as a central component.

WHEN TO USE

This sales review tool should be completed by each representative at the conclusion of each month.



**BUSINESS DEVELOPMENT
REVIEW**

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NAME _____
PERIOD ENDING _____

<i>PROSPECTING ACTIVITY - Getting opportunities into the funnel</i>				
DATE	ORGANISATION	CONTACT	OPPORTUNITY	NEXT ACTION

HOW TO USE

This report follows the phases of the sales opportunity funnel. It requires sales representatives to report on their activity for the previous month and selling plans for the coming month. It will enable you, as sales manager, to determine whether every stage of referral is being managed appropriately as well as being able to compare sales activity with targets.

PROSPECTING ACTIVITY

The first part of this review is concerned with activity aimed at getting new prospect opportunities into the funnel.

Here, sales representatives should record prospecting activities that have been undertaken during the month. Separate columns are provided in the report to show the date of each contact, the name of the prospect organisation, the main contact (either by name or by position), the nature of the opportunity and actions planned for the following month.

This format will allow you as the sales manager to review the extent of prospecting activity and ensure that it is sufficient to achieve sales targets. It will also let review the quality of prospects that each sales representative is collecting into their funnel.

SELLING ACTIVITY - Opportunities in the funnel				
#	ORGANISATION/ OPPORTUNITY	DATE ENTERED FUNNEL	\$ VALUE	SELLING PLANS - NEXT MONTH

SELLING ACTIVITY

In this section, each sales representative overviews the opportunities that are currently in the funnel and provides a report on selling progress.

Each of these opportunities should be given an identification number. The opportunity should then be described by recording the name of the organisation and the opportunity, the potential product that will meet the prospect's need and the dollar value of the sale. For forecasting purposes, the sales person should estimate a closing date for the opportunity. This will obviously increase in accuracy as the opportunity progresses down the sales funnel.

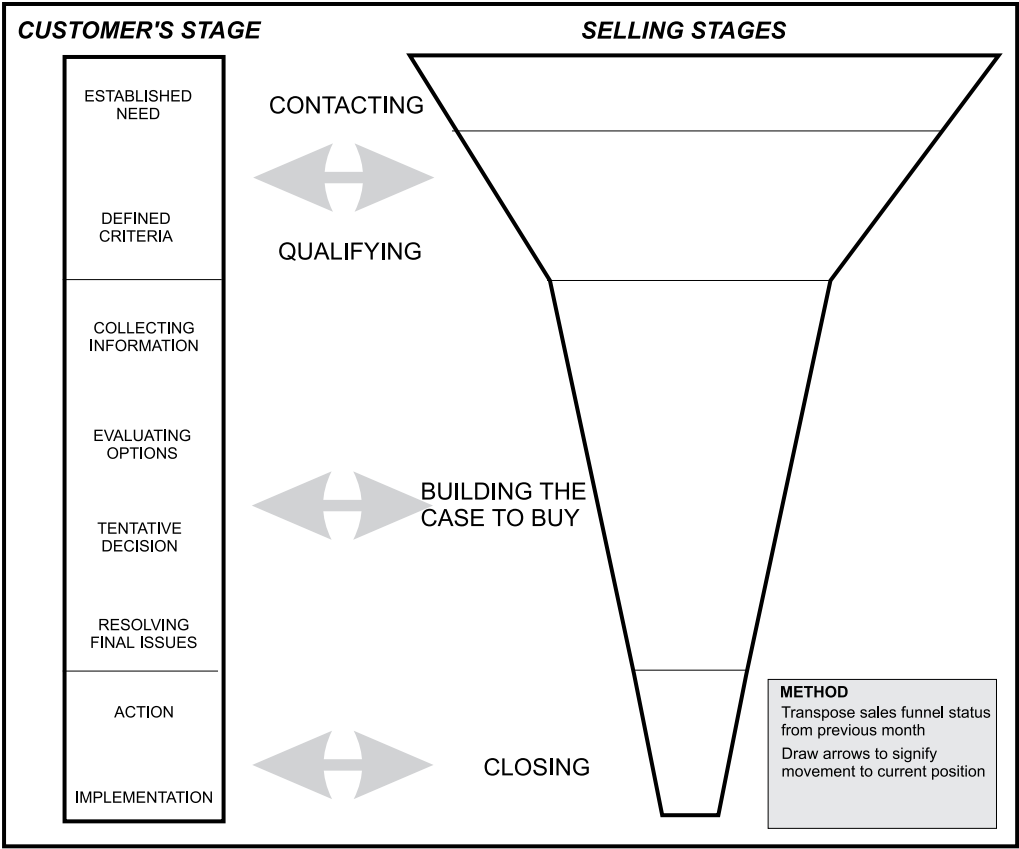
The final column in this part of the report asks the sales person to define their selling plans for this opportunity for the coming month. This encourages forward planning of sales activity and will help you to ensure that adequate plans are in place for further progression of the opportunity.

A diagram of the funnel is included so that opportunities can be illustrated at their current stage of the selling process. Each opportunity should be recorded by its code number. The location of the number should represent the opportunities position in the funnel at the beginning of the month. An arrow should be drawn to show its current position.

The location of an opportunity may change during the month in a number of ways:

- 1 It may progress to a further stage down the funnel
- 2 It may fall out of the funnel and lost to a competitor or the prospect's decision not to proceed.
- 3 In some cases an opportunity may have to be moved back up the funnel. This will happen in situations where the perceived location was incorrect or the customer decided to review a specific part of their buying decision.

To the left of the funnel is a column representing the typical stages of a customer's buying decision for a highly valuable item or complex sale. Take care to ensure that the location of the opportunity in the sales opportunity funnel approximates the sales representative understanding the stage of the customer's buying decision process.



CURRENT PROJECT/IMPLEMENTATION ACTIVITY		
ORGANISATION	CURRENT ACTIONS	COMPLETION DATE

STRATEGIC ACCOUNTS

Not all of a sales persons activity in will be directed to identifying and managing new opportunities. Some part of their time must be spent on managing strategic accounts.

This section provides space to report on these activities. It assumes that account management is a proactive task; one that is be initiated by the sales person.

Activities that may be described here could include, for example:

- Account review meetings.
- Presentations to new decision makers, influencers and recommenders.
- Relationship activities that will extend the business partnership.
- Product or service development projects to meet specific customer needs.

CURRENT BUSINESS DEVELOPMENT INITIATIVES		
ACTIVITY	STATUS	OBJECTIVES FOR NEXT MONTH

ACTIVITY TARGETS					
	Actual	Plan	Last Month	% Plan	% Last Month
<i>Sales meetings</i>					
<i>Joint management calls</i>					
<i>Customer functions</i>					
<i>Proposals submitted</i>					
<i>Product presentations</i>					
<i>Prospecting contacts</i>					
<i>Development projects</i>					
<i>Other</i>					

RESULTS ACHIEVED			
\$ This Month	% Target	\$ YTD	% YTD Target

BUSINESS DEVELOPMENT INITIATIVES

Normally some selling activity is devoted to business development tasks that will not produce initiate sales, but will involve term create business opportunities. It is important that sales people involved themselves in sufficient business development activities to maintain a long-term supply of opportunities.

This section unreported provides space to report on these activities. Examples of these activities could include:

- Attendance at trade shows or exhibitions.
- Meetings with third parties that may act as referral sources or specifiers.

PROBLEM SITUATIONS

Where there is a current customer problem it should be recorded in this section of report. This will allow you to review the nature of significant customer problems, provide coaching and ensure that an adequate response is being implemented by the sales person.

ACTIVITY TARGETS

Even though this report relates to longer-term selling or high value sales opportunities, success is till a result of sufficient activity. In this section of the report the sales representatives should report on the number of activities that have taken place during the month. The list of activities broadly follows the stages of the sales opportunity funnel. At the beginning of the month, the representative will have established targets for each activity. At the end of the month actual results can be recorded and compared to planned targets and those of the previous month. The pattern of each persons activity over time will enable you to identify some activity related performance problems.

RESULTS ACHIEVED

The bottom line of any sales report is the amount of revenue generated by the sales person. The final section of this report provides space for a summary of revenues. Results achieved for the month and year -to-date should be recorded and compared against quota or target.

SUMMARY

The monthly business progress review is an easy-to-use reporting process. It combines a revue of the previous month's selling activity with stated follow-up plans for the following month. By focusing on key sales performance indicators it helps you as the sales manger to easily monitor and review sales activities and the ways in which they relate to sales results.

SALES PLANNING TOOLS



SALES ACTIVITY PLANNER

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Territory	Sales Representative	Sales Period
<i>Complete and submit to Sales Manager on or before third working day of the new sales period</i>		
TOTAL SALES BUDGET OR TARGET FOR THIS PERIOD		\$
TARGET FROM CURRENT ACCOUNTS		\$
1. KNOWN REVENUE POTENTIAL OF MAJOR ACCOUNTS (Confirm using the qualifying checklist)		
Account	Revenue	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
TOTAL		\$
2. AGGREGATE FORECAST FROM OTHER ACCOUNTS		\$
TOTAL KNOWN/FORECAST REVENUES FROM CURRENT ACCOUNTS		\$
GAP REMAINING TO BE SOLD IN CURRENT ACCOUNT BASE		\$
TARGET FOR NEW BUSINESS		\$

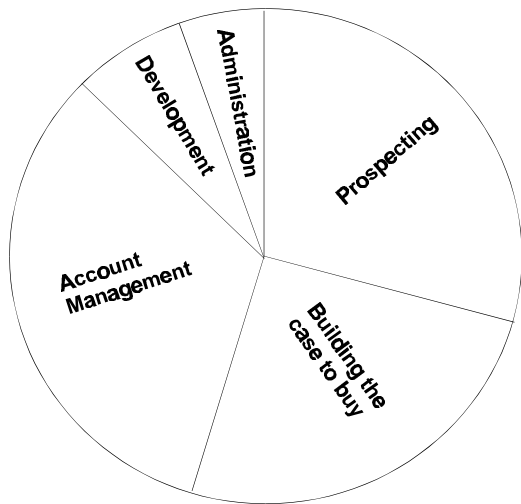
Sales Activity Planner

ACCOUNT BASE ACTIVITY		NEW BUSINESS ACTIVITY		TOTAL
CURRENT BUSINESS SALES GAP	\$	NEW BUSINESS TARGET	\$	\$
TYPICAL SALES REVENUE PER DEAL	\$	TYPICAL SALES REVENUE PER DEAL	\$	
NUMBER OF SALES REQUIRED TO ACHIEVE SALES GAP		NUMBER OF SALES REQUIRED TO ACHIEVE TARGET		
NUMBER OF PROPOSALS		NUMBER OF PROPOSALS		
NUMBER OF PRESENTATIONS		NUMBER OF PRESENTATIONS		
NUMBER OF OPPORTUNITIES		NUMBER OF PROSPECTS		
APPROACH ACTIVITY REQUIREMENTS EACH WEEK				

Time Planner

TIME ALLOCATION

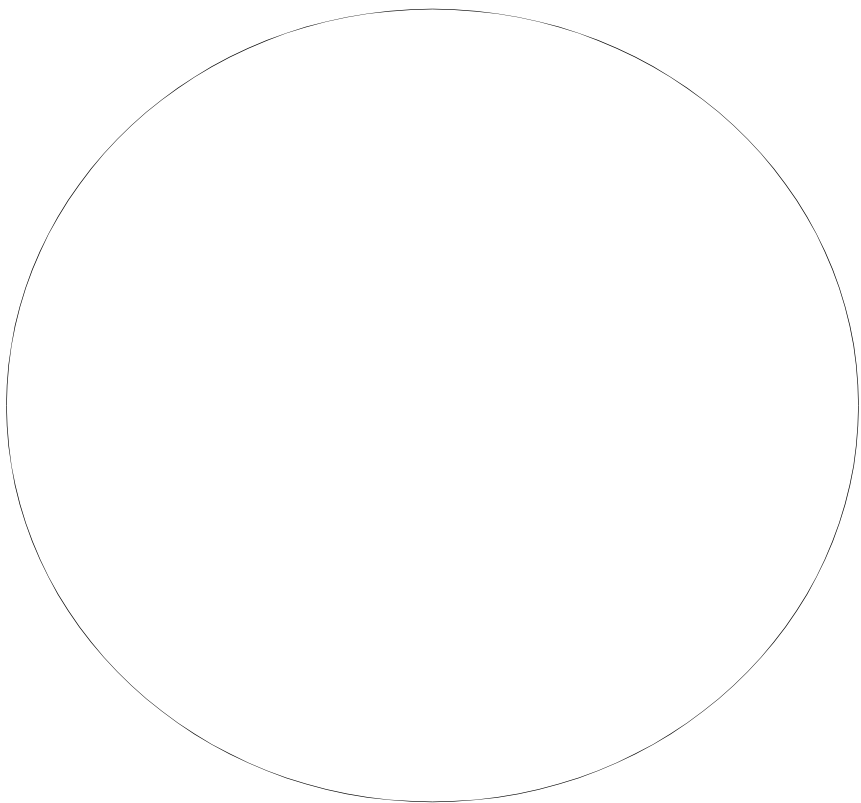
Plan the allocation of time that you will require to achieve your territory goals.
(Ensure that your allocation of priorities is consistent with your Activity Planner)



Sales Tasks typically include:

- Prospecting
- Building the case to buy (selling)
- Account management
- Business Development Tasks
- Administration

DEFINE YOUR TIME PRIORITIES



Activity Plan

X

{

5

X

{

4.2

}

=

NO OF
QUALITY
CUSTOMER
CONTACTS
PER DAY

NO OF
DAYS PER
WEEK

NO OF
WEEKS PER
MONTH

TOTAL
CUSTOMER
CONTACTS
AVAILABLE
PER MONTH

USING THE RATIOS DEFINED IN THE TIME PLANNER, DEFINE THE NUMBER OF CONTACTS THAT SHOULD APPEAR IN YOUR MONTHLY PLANNER FOR EACH TYPE OF SELLING ACTIVITY

NOTE: The above formula allows at least one day per month for administration, sales meetings, training etc. Do not allow necessarily more time for non selling contact.

PROSPECTING CALLS

CALLS TO BUILD THE CASE TO BUY, PROMOTE A PRODUCT, PROGRESS A SALE (SELLING)

CALLS TO MANAGE AN ACCOUNT

BUSINESS DEVELOPMENT ACTIVITIES

OTHER

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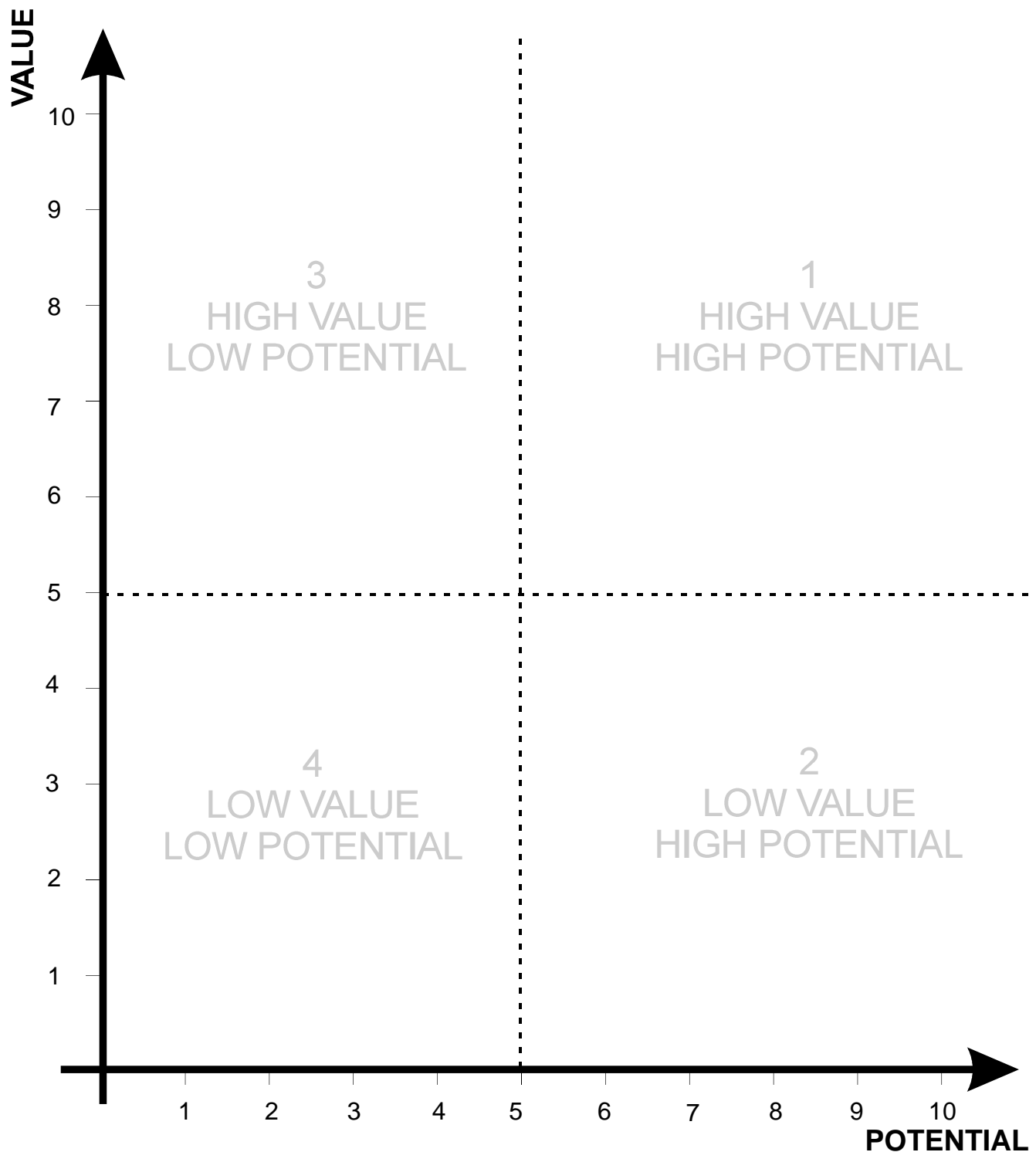
<i>Organisation</i>	<i>Contact</i>	<i>Address</i>	<i>Telephone</i>

Territory	Representative	Period
------------------	-----------------------	---------------

Submit to Sales Manager on or before third working day of the new period

CURRENT ACCOUNT ANALYSIS

Plot the position of each account in the matrix



Customer Visit Schedule

<i>PRIORITY ONE</i>	<i>PRIORITY TWO</i>	<i>PRIORITY THREE</i>	<i>PRIORITY FOUR</i>
Most frequent contact Highest costs of sale Grow and Maintain	Frequent contact Invest sales expenses into the future Grow	Regular contact Maintenance costs Protect	Minimal contact Low relationship costs Retain? / Divest?
<i>Contact frequency</i>	<i>Contact frequency</i>	<i>Contact frequency</i>	<i>Contact frequency</i>



ACCOUNT PLANNER

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CUSTOMER

ADDRESS

TELEPHONE

FACSIMILE

E-MAIL

MAIN BUSINESS ACTIVITY

NUMBER OF EMPLOYEES

MAJOR CONTACTS

NAME	POSITION	TELEPHONE

ADDITIONAL CUSTOMER INFORMATION

RESPONSIBLE SALES / ACCOUNT REPRESENTATIVE

FILE CREATION

UPDATES

	Date		By Whom	
	Date		By Whom	
Date:				
By Whom:				

Organisation Chart

Draw an organisation chart of the customer's business to include:

- * The business structure including subsidiaries and associated businesses*
- * Key decision makers and positions that influence your relationship*

Relationship History

PRODUCTS

[illegible]

SERVICE RELATIONSHIP

<i>Service provided</i>	<i>\$ Value</i>	<i>Date</i>

SPECIAL ISSUES / CONDITIONS[illegible]







Product/Service Usage Gap Analysis

LIST ALL APPLICATIONS / SERVICES REQUIRED AND/OR USED BY CUSTOMER

LIST PRODUCTS WE, AND OUR COMPETITORS, SUPPLY

[illegible]

SUPPLIER ANALYSIS

 WE CURRENTLY SUPPLY	 <i>Competitor 3</i>
 <i>Competitor 1</i>	 <i>Competitor 4</i>
 <i>Competitor 2</i>	 <i>Competitor 5</i>

BEST OPPORTUNITIES

--

SWOT Analysis

STRATEGIC FACTOR	ANALYSIS OF CUSTOMER
STRENGTHS <i>Factors that enhance your influence and competitive position with this customer</i>	
WEAKNESSES <i>Factors that make you vulnerable with this customer</i>	
OPPORTUNITIES <i>Factors that result in further sales opportunities with this customer</i>	
THREATS <i>Factors that limit your sales opportunities with this customer</i>	

Account Plan

PRODUCTS / SERVICES
<i>Define products / services which can be addressed or provided</i>
RELATIONSHIP
<i>Define relationships to be developed or expanded</i>
INTERNAL
<i>What resources will be required to support this customer</i>
NEW
ADDITIONAL

Action Plan

<i>TASK</i>	<i>BY WHOM</i>	<i>BY WHEN</i>

This page is intentionally left blank

Customer

Meeting Date / /

PRIMARY OBJECTIVE: *(Write here in full)*

MANAGING THE MEETING

- * *Be planned – set a clear objective*
- * *Work to a prepared agenda*
- * *Clear, regular time scheduled – no interruptions*
- * *Start and finish on time*
- * *Encourage active participation*
- * *Keep the meeting interesting (and moving)*
- * *Don't allow negative discussion - keep on task*
- * *Restrict discussion directly to customer management issues*
- * *Don't allow the 'crisis of the day' to dominate*
- * *Be positive and constructive*
- * *Use supporting material when possible*

REVIEW RECENT PAST PERFORMANCE

Products/services used, range of applications

QUANTIFY VALUE OF CURRENT SERVICES/PRODUCTS

Usage, savings, productivity increases, contribution

NEW OPPORTUNITIES?

Consider needs arising from:

- * *Dissatisfaction*
- * *Imposed change*
- * *Technical change/updating*
- * *Performance issues*
- * *Expressed needs*
- * *New products*

Account Review Planner

PEOPLE CHANGES?

DEFINE FUTURE PLANS/NEEDS/REQUIREMENTS

AGREED ACTION PLANS

By whom? By When?

Account Manager's Signature

Date / /



MONTHLY SALES PLANNER

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Name	Territory	Month
------	-----------	-------

Sales goals include:

- Planned levels of contact with current customers
- Constant prospecting to identify new business opportunities
- Planning sales activities to convert identified opportunities into sales revenue

This planner will assist sales representatives to work proactive sales activity that enhances results

Complete the plan on or before the first business day of the month

KEY SELLING EVENTS PLANNED *List prior to start of month*

PERSONAL SALES CALLING PROGRAM

*List planned targets on or before the first working day.
Enter dates as appointments confirmed, mark completion with a ✓*

Individual/Company contact & number	Date	✓	Individual/Company contact & number	Date	✓

Complete a sales call planner before each customer/prospect contact.



Enter planned sales calls, customer functions and other sales related events and

[illegible]

activities in the planner. Include key sales functions, business development activities and events.

THURSDAY	FRIDAY	
		SELLING ACTIVITY CHECKLIST Monitor sales activity and results <ul style="list-style-type: none"><input type="checkbox"/> Continually look for ways that you can increase you sales performance and productivity.<input type="checkbox"/> Call on current customers in accordance with established contact frequency plans<input type="checkbox"/> Ensure that prospecting activity is sufficient to achieve target sales objectives<input type="checkbox"/> Plan presentations that link to the prospect's business, needs and situation<input type="checkbox"/> Monitor key current proposals<input type="checkbox"/> Measure and monitor sales activity<ul style="list-style-type: none"><input type="checkbox"/> Sales calls<input type="checkbox"/> Telephone activity<input type="checkbox"/> Proposals<input type="checkbox"/> Prepare and submit weekly/monthly sales reports<input type="checkbox"/> Attend weekly/monthly sales meetings<input type="checkbox"/> Carry out short term sales campaigns and competitions<input type="checkbox"/> Monitor cross-selling opportunities
		RELATIONSHIP ACTIVITY CHECKLIST <ul style="list-style-type: none"><input type="checkbox"/> Customer functions/briefings<input type="checkbox"/> Client luncheons/briefings<input type="checkbox"/> Product based short sales programs<input type="checkbox"/> Selective mail-out and telephone follow-up<input type="checkbox"/> Telemarketing programmes<input type="checkbox"/> Circulation of technical information to key large accounts<input type="checkbox"/> Demonstrations & presentations<input type="checkbox"/> Networking events<input type="checkbox"/> Seminars<input type="checkbox"/> Remembering significant personal events

Sales Planner

ACTIVITY TARGETS						MAJOR WINS		
	Actual	Plan	Last Month	% Plan	% Last Month	Customer	Product	\$
Sales meetings								
Joint management calls								
Customer functions								
Proposals Submitted								
Product presentations								
Prospecting contacts								
Other								
Enter targets on or before the first business day of the month								

FORWARD ACTIONS List follow-up and forward planned actions below

Date	Contact	Action

PHONE NUMBERS



WEEKLY SALES PLANNER

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Name				Territory	Week Ending / /
Complete the first four columns prior to week commencing. Complete the "Outcome/Next Step column" at the conclusion of each customer contact					
Day	Organisation	Status	Purpose	Objective	Outcome/Next Step
	Name/Contact	Customer or Prospect	Prospecting Selling Acct Mgt Service Call Other	Define your purpose in making this contact. Explain what you expect to accomplish	Describe the next steps or follow-up actions resulting from the meeting.
MONDAY					
TUESDAY					
WEDNESDAY					

Weekly Sales Planner

	Complete the first four columns prior to week commencing. Complete the "Outcome/next Step column" at the conclusion of each customer contact				
Day	Organisation	Status	Purpose	Objective	Outcome/ Next Step
	Name/Contact	Customer or Prospect	Prospecting Selling Acct Mgt Service Call Other	Define your purpose in making this contact. Explain what you expect to accomplish	Describe the next steps or follow-up actions resulting from the meeting.
THURSDAY					
FRIDAY					

ACTIVITY TARGETS					
	Actual	Plan	Last Week	% Plan	% Last Week
Sales calls					
Joint management calls					
Customer functions					
Proposals submitted					
Product presentations					
Prospecting calls					
Development activities					
Other					

[illegible]

[illegible]



SALES CALL PLANNER

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Plan your sales calls for all new business and existing customer calls

<i>Prospect/Contact</i>	<i>Position</i>	<i>Date</i>
PREPARATION <i>Work through this section prior to the sales call</i>		
RESEARCH <i>Special comment:</i>		
<i>Industry/Main business activity?</i>		
<i>Size/Turnover?</i>	<i>No. of employees</i>	
<i>Products manufactured or services provided?</i>		
<i>Current products used?</i>		
<i>Related needs?</i>		
<i>Last call/contact?</i>		
<i>Notes</i>		
PURPOSE <i>Why are you making this contact?</i>		
<input type="checkbox"/> <i>gather information</i> <input type="checkbox"/> <i>qualify an opportunity</i> <input type="checkbox"/> <i>deliver a presentation</i>		
<input type="checkbox"/> <i>continuing to build the case buy</i> <input type="checkbox"/> <i>make a proposal</i> <input type="checkbox"/> <i>close a deal</i>		
OBJECTIVE <i>What commitment are you seeking from the customer/prospect?</i>		
<i>What is the next step?</i>		
PROSPECT PERCEPTION <i>Why does the person think you are calling?</i>		
STRATEGY <i>How will you meet your objective?</i>		
<i>What is the prospect problem/opportunity you have identified?</i>		
<i>Does the prospect recognise the need?</i>		
<i>What product/service will provide a solution?</i>		
<i>What is the prospect benefit?</i>		
<i>How will you demonstrate this?</i>		
<i>How will you secure prospect commitment to the next step?</i>		



RECORD OF PERSONAL CONTACT

PREPARATION

Address

Date

Time for call

Confirmed?

☐

Marketing and product brochures?

Done necessary calculations?

NOTES

CALL OBJECTIVE Write desired outcome in full:

Concentrate

Listen actively

Note relevant details

Probing

● What now?

● What problems?
Why?

● What plans?

● Competitors?

● Decision process?

● Buying criteria

● Budget?

ACTIONS / FOLLOW-UP

Leave your business card

DIAGNOSIS Did you meet your objective?

Personal performance?

Improvement needed?

Signature

Date

File in customer file as a record of contact

Organisation		Opportunity	Date
Complete before proceeding to the funnel stage of "Building the Case to Buy"			
FACTOR	KEY QUESTIONS	EVALUATION	✓/x
C COMP- ETITION	Do we know who the competition is? Do we have a defined strategy for beating them?		
A ANSWER	Do we have a viable answer to their needs? Will it work? Has the prospect confirmed that our product/service meets their buying criteria?		
T TIME FRAME	Do we have clear understanding of the time table to a decision?		
W WORTH IT?	Is this a deal that we really want to commit resources to? Is it big enough? Is it strategic enough?		
O ONLY ME?	Has the customer confirmed that we have a unique component? Has the customer confirmed that this forms part of their decision criteria?		
M MONEY	Is their budget defined and approved? Does our solution fit their budget?		
A AUTHORITY	Do we have a clear understanding of the people and process involved in making the decision? Do we have ready access to them?		
N NEED	Is there a real imperative for this deal to happen? If not, can we create one? Is this a want or a real need?		

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PERIOD ENDING

DATE _____

ORGANISATION

CONTACT

OPPORTUNITY

NEXT ACTION

[illegible]

SELLING ACTIVITY - Opportunities in the funnel

[illegible]

CURRENT BUSINESS DEVELOPMENT INITIATIVES		
ACTIVITY	STATUS	OBJECTIVES FOR NEXT MONTH

ACTIVITY TARGETS					
	Actual	Plan	Last Month	% Plan	% Last Month
Sales meetings					
Joint management calls					
Customer functions					
Proposals submitted					
Product presentations					
Prospecting contacts					
Development projects					
Other					

RESULTS ACHIEVED			
\$ This Month	% Target	\$ YTD	% YTD Target

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