

Creating a Powerful Sales Plan

By Dave J. Kahle

Field sales people have a unique aspect to their jobs: they have the ability to decide what to do every moment of every day. The need to make this decision — where to go, who to see, who to call, what to do —distinguishes the sales profession from most others. The quality of this decision, more than any other single thing, dictates the quality of a sales person's results. Consistently make effective decisions, and your results will improve. Make thoughtless, habitual or reactive decisions, and your results will be sub-par.

One of the ways to ensure that you make good decisions about your selling time is to create a comprehensive sales plan; a written, thoughtful set of decisions about the most effective things you can do. A sales plan should be the result of some good thinking, wherein you analyze and prioritize a number of different aspects of your job. A good sales plan addresses different time durations and different aspects of your job.

Annual planning retreat

Every sales person should discipline himself/herself to conduct an annual planning retreat. Set a day or two aside, every year, to engage in some serious planning. Turn off the phone, shut down the email, and immerse yourself into deep thought about the coming year. Begin by specifying a series of annual sales goals. What, specifically, do you want to accomplish this year in your job? I recommend no more than five specific sales goals. Typically, one of these goals describes the total volume of sales dollars you want to create; another may describe the number of new customers you want to acquire; yet another may relate to the number of high potential customers with whom you want to increase your business. Regardless of what your goals are, an annual, written, specific set of goals is the beginning of a sales plan.

Next, give some thought, and express that thought on paper, as to your basic strategy to accomplish those goals. If you're going to acquire 20 new customers, for example, exactly what are you going to do in order to accomplish that annual goal?

Classify all your prospects by their potential. Rank them in order, identify those with the most potential, and then plan to spend more time with the highest potential prospects

Re-organize your filing system; throw out the obsolete hard copies and delete the unnecessary electronic files.

To do this well, you will need to devote a full day or two. This annual exercise is the first part of a good sales plan.

Monthly plan

Next, you should develop a more detailed plan every month. Produce a one or two page document which contains your specific commitments to the most effective actions. Once again, you are required to analyze and prioritize your efforts in regards to a number of issues.

First, your monthly objectives: What do you want to accomplish, relative to the annual goals that you set? If you said you wanted to sell \$2,000,000 worth of goods this year, how much do you have to sell this month? Each of your annual goals should have a monthly component.

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Next, address your prospects and customers. In order of priority, in which prospects and customers should you invest your time? That priority often takes the form of a methodical and objective ranking into categories - typically A, B, and C — based on potential. The sales plan should describe your plan for coverage of the A's and B's.

Address the CTM opportunities, regardless of where they occur. CTM stands for Closest To the Money. Analyze and prioritize your efforts related to those opportunities within your territory that are closest to the money. What are you going to do to bring each of them to fruition? Specify for each the dollar amount of the opportunity, and what your actions should be.

Your company may have certain key products or product lines that it wants to emphasize. If so, you'll need to analyze and prioritize your efforts in regard to those product lines. What will you do this month to increase sales of each product line? What specific actions will you take, in which specific accounts?

Finally, what will you do this month to improve yourself? What classes or seminars will you attend? What books will you read? To which CDs will you listen?

Note that all of this addresses not every action you will take, but rather the most effective actions. You can note these things on a page or two.

Don't think that you can keep all this in your head, and skip the discipline of writing it down. Writing each specific action and strategy down, whether it's on a yellow pad or a computer document, forces precise thinking. The written word also commits you to a much deeper degree than if you keep the idea locked in your head.

After you've completed this monthly sales plan, it's time to schedule your time. Lay out a plan for each day for the next 30 days. Where will you plan to be, and who will you plan to see? Reflect first your priorities from your monthly plan. Then fill in the non-priority calls.

You and I both know that your days will rarely go according to plan. However, without a plan, you will have totally given up the ability to control and manage your time. By having a plan, you have something to fall back on, something to refer to, some benchmark by which to measure the constant and urgent demands on your time.

Weekly plans

Next, you need to reorganize and recommit to your monthly time and territory plan each week. Adjust your plan based on what actually happened the previous week. For example, if you didn't get to see an account that you had planned on seeing, can you see them this week instead? Make your adjustments each week. At the end of each week, spend some time planning and preparing for the upcoming week.

Daily plans

Finally, you need to plan each sales call. What do you want to accomplish in each call? What do you need to prepare in order to accomplish your goals? Again, you'll be more focused and more committed if you write down a specific outcome that you would like to achieve in each sales call. Keep in mind that sales is a process, consisting of a series of steps that the buyer and seller take to come to a good decision. Your planned outcomes should be narrow and specific, instead of just "Sell this account."

The creation of a sales plan, as you can see, is not a simple, one-time event. Rather, it's a discipline that involves a commitment of time and thoughtfulness at specific intervals throughout the year. This is not just an administrative

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requirement, but a powerful tool that enables professional sales people to consistently make good decisions about the most important issue they face: Where to go and what to do.

About the Author

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