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# **Creating a Successful Sales Plan**



Slideshare Edition

# Welcome



- Your Presenter:
  - Deb Brown
  - Practice focus:
    - Sales coaching
    - Sales training
  - Clients include:
    - Small businesses
    - Growing companies
    - Fortune 500



# Agenda

- What is a sales plan?
- Why is a sales plan important?
- How do I create a sales plan?
- What are the steps to create one?
- How do I put the plan into action?
- How do I monitor sales progress?
- What next steps can I take?



# What is a sales plan?

- A sales plan is a document that:
  - Defines clear sales goals
  - Establishes your 'best fit' customers
  - Guides and focuses your sales team
  - Lays out a sales activity plan
  - Enables you to track sales progress



# Why is it important?

- A sales plan is important because it:
  - Brings clarity to your sales efforts
  - Allows your sales team to focus on specific markets, prospects and customer types
  - Enables everyone to track progress openly, rather than in a closed/inconsistent manner
  - Provides essential information you can use to manage the sales effort



# How to create a sales plan?

- A sales plan is created in steps:
  - **Step One:** Set goals
  - **Step Two:** Identify 'ideal' prospect
  - **Step Three:** Create activity plan
  - **Step Four:** Track activity and behavior
  - **Step Five:** Define how to review progress



# Step One: Set goals

- Your goals should include:
  - Your 'break-even' expenses today
  - Your revenue requirements to build a profitable business
  - How current pricing is set
  - How you can package products, services and options to bring in more revenue
  - How many sales are needed to grow your company



# Step Two: Identify ideals

- Your ideal prospect or customer is:
  - Customer who benefits most from your products or services
  - Type of customer who uses what you offer completely, and gains greatest value
  - Matches the configuration or approach that your products/services are designed for
  - Well suited to your price range or requirements





# Step Three: sales activity

- Your sales activity plan should include:
  - Amounts of sales volume you need to reach
  - Best types and mix of sales to get there
  - Standard ratios from activity to sale:
    - Number of contacts that become leads
    - Number of leads that become opportunities
    - Number of opportunities that become sales
    - Number of customers who purchase again or buy additional options or enhancements
  - Activities to move to each step



# Step Four: sales tracking

- Your sales tracking should include:
  - Critical sales behaviors/actions
    - Calls, appointments, follow-ups, etc.
  - Amounts of each behavior/action needed
  - Checklist of qualifying steps, dates completed
  - Opportunity status (% likelihood to close)
  - Additional activities that cultivate warm leads
    - Emails, announcements, specials



# Step Five: review progress

- Your sales review process should:
  - Provide clear instructions
  - Give sales staff benchmarks and checks they can use to self-monitor progress
  - Be actively used by the business owner or sales manager
  - Allow for team members to share 'best practices' with one another
  - Stay flexible and responsive to new market conditions



# Implementing a sales plan

- The sales plan needs to be ‘baked in’
- If you have a CRM or contact management system, add the sales plan numbers to its tracking/reporting
- Seek sales team input and ‘buy in’
- Use the sales plan in hiring and reviews
- Train your team ‘to the plan’



# Monitoring sales plan impact

- Sales manager should monitor progress on a daily basis
- Have weekly meetings to review and adjust plans based on team input
- Make sure that territory and house account assignments are balanced
- Benchmark monthly and quarterly
- Encourage sales team members to track their own progress



# Taking next steps

- Think about how you can begin a sales planning process internally
  - Must have team buy-in
  - Having software tools can be helpful
  - May benefit from outside support
- Deb Brown Sales can assist you:
  - Sales Planning
  - Sales Coaching
  - Sales Strategy



# Learning more...

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**Thank you!**



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