ADVENTACE®
CREATE THE HIGH PERFORMANCE SALES ENVIRONMENT

Planning for Success– Six Key Steps to a Meaningful Territory Plan

As sales managers, it is perfectly within our rights to ask our sales people to build territory-level business plans. However, we often forget that we did not hire our sales representatives based upon their strategic business planning and data analysis skills. So while there are clear benefits that are derived from the planning and goal setting process, it is incumbent upon us as managers to provide our team members with the tools and the templates that they need to develop effective plans in a very efficient way. Here are some tips:

1. Define the planning process. Just as you define your sales or opportunity management process, define the steps of your planning process.

2. Make it easy. Develop tools and templates for your sales people to fill in. Stress that this YOUR investment in THEM, rather than positioning it as another mandatory report to fill out or administrative task to be completed.

3. Prepare in advance. Provide your sales reps with a planning template that already has included:

a. A brief Territory "Dashboard" Analysis that summarizes key territory characteristics such as numbers of A, B and C customers, number of prospects, average order sizes & numbers of orders by customer segment and product group, etc.
b. An updated customer list with historical sales data
c. Key prospect lists
d. Your sales team will love you for providing them with a "Dashboard View" of this information, and the statistics that you gather for each territory will you to help you set territory-based "Standards of Excellence" based upon actual data from your top producing sales people and territories.

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4. Schedule the planning activity. Schedule a one-day planning workshop, with time for one-on-one breakout sessions with each sales person to review personal income goals, past performance and expectations for the upcoming year.

5. Implement the plans. Schedule a call blitz for the day after the planning session. This way you know that your sales team has scheduled appointments with the accounts that they have targeted as strategic to hitting 2005 goals. Once the planning process has been completed, the key to success is execution and follow-up.

6. Follow Up. Leverage your CRM system to track results against goals set in the territory plans. If you don't have a CRM system, develop your own system for tracking results and review progress monthly with your team.

In association with HarvestGold™, Adventace provides the HG Sales Planning Process. Please call 724-443-2383 for more information.