

## Creating “The Winning Sales Plan”

In 2017, I was doing some research for my new course, *“The Art & Science of Sales”*, at Tufts University, where I have the privilege of being a Professor of the Practice and Director of the Entrepreneurship Center. I’ve been teaching a somewhat unique course in Marketing at Tufts for 14 years, and in the spring of 2017, I decided to create a course titled **“The Art & Science of Sales”**, which I’ve now been teaching for three years. Each semester, the course and this ebook evolve so at any time if you want to edit or add anything to this document, I would greatly appreciate it and give you credit for that addition. Drenched primarily in Hubspot and Brainshark marketing and sales enablement technologies, process, tools, and metrics, this course, and therefore this ebook follow the same requirements and rigors of my Marketing course in that the “teaching content” of the course is wrapped around projects from real companies who want to develop a fully developed marketing, or in this case, a tactical sales plan of some type for their companies. Some of these companies for whom my students create sales and marketing plans are functioning startups while others are well-established middle market businesses.

If you’re interested in participating, by the way, just connect with me, and I will send you an example of a recent syllabus and the instructions as to how to apply. When I was creating the syllabus, it seemed to be the correct balance of content, complexity and creativity. As with any new course, during the first couple of weeks, the complexity side of that equation seemed to be out of balance with everything else, which led me to search for solid examples of winning sales plans that I could demonstrate to my 30 or so undergraduate and graduate students.

As I often do every week, sometimes every day, I rebalance my attention from being a Tufts professor to running our management consulting firm, where for 30 years we’ve been sharply focused in general strategy and our somewhat unique focus on Sales and Marketing productivity improvement. Sure, there are tons of consulting companies ranging from Boston Consulting Group down to Single-Shingle Consultants, who do the same things with different cute names for what they do, but, in reality, what every business leader...and every salesperson cares about is improving the efficiency of their own productivity while improving the effectiveness of their work with their customers.

During the creation of the Tufts course, titled *“The Art & Science of Sales”*, given all of the sales work that Derby Management had been doing for years, I knew that it would be an easy task to take a selection of very good sales plans, redact the specifics of company names and anything else that could be considered to be confidential and then use them as part of my teaching throughout the semester. At least that process would serve to provide some level of real examples and potential templates to fill out the structure provided in the classroom.

What should have been an easy and quick search turned into a desperate and depressing realization that in 90% of these examples, completed sales plans did not exist. They simply did not exist. What did exist in our files by the hundreds were...

- Quarterly action plans
- Monthly activity plans
- Playbooks
- Skills Training plans
- Waterfall Sales & Marketing math

...but very few really solid examples of fundamental, foundation-setting annual sales plans.

- Annual Sales plans that should have been written in November and December, as part of the annual company planning and budgeting process for the following year.
- Annual Sales plans that would have included longer term strategies and the detailed tactics that had been directly integrated into those strategies, forecasts, metrics, KPIs and budgets.
- Annual Sales plans that would have set the foundation for everyone in Sales from regional managers to individual account execs to define their own personal quarter-by-quarter selling plans
- Annual Sales plans that would have been discussed in detail at the kickoff sales meeting in January.

Bottom line here is that in every company, of every size, there should be would be both annual and quarterly sales plans that would have then been tweaked up in early January and rolled out at the January national sales meeting with strict requirements to have regional, district and then quarterly individual plans developed to be reviewed and approved within the following week. Pretty standard stuff I thought since that's the way that I grew up as a salesguy and was required to do, but more importantly, it was what I have always considered to be a "normal" building block for any business, any sales department at any level from national to regional to territory plans down to individual quarterly selling plans at the street level.

There's no real "invention" here. These requirements are the exact same that I and all my counterparts were required to do as regional managers and as heads of the sales department. And yet, the result that I learned from reviewing hundreds of customer plans was that real annual sales plans simply did not exist in many cases. The other issue that I soon realized that by attempting to make these plans confidential but still useful for my students was simply impossible since I was stripping out the reality and the personality of the plans themselves.

Through this process of assessing plans in our files, what I did discover were....

- Hundreds of engineering and product plans
- Hundreds of excellent marketing plans
- Gigabits of financial plans by month, quarters and years
- Terabytes of commission and bonus plans
- Hundreds of big bullet PowerPoints that were both strategy and objectives, but little to do with tactics

...but no annual sales plans beginning with detailed definitions of what the overarching strategies would be moving down into tactical warfare and then coming down to the street level in terms of detailed activity planning for key accounts, sales model structure, hiring-recruiting-onboarding, training and the use of technology tools.

Where I discovered that pieces of real plans did exist, correspondingly I assessed that the performance of the company overall was “very good”. Where I discovered that only financial expense budgets and annual sales forecasts existed as the primary planning documents, not surprisingly, the overall prior performance had been weak or marginal, at best. As a sales manager and a management consultant, for me there was no real surprise in the performance results. The big surprise for me during this process was the lack of real 12-month sales plans.

It was General Eisenhower at the invasion of Normandy who said...

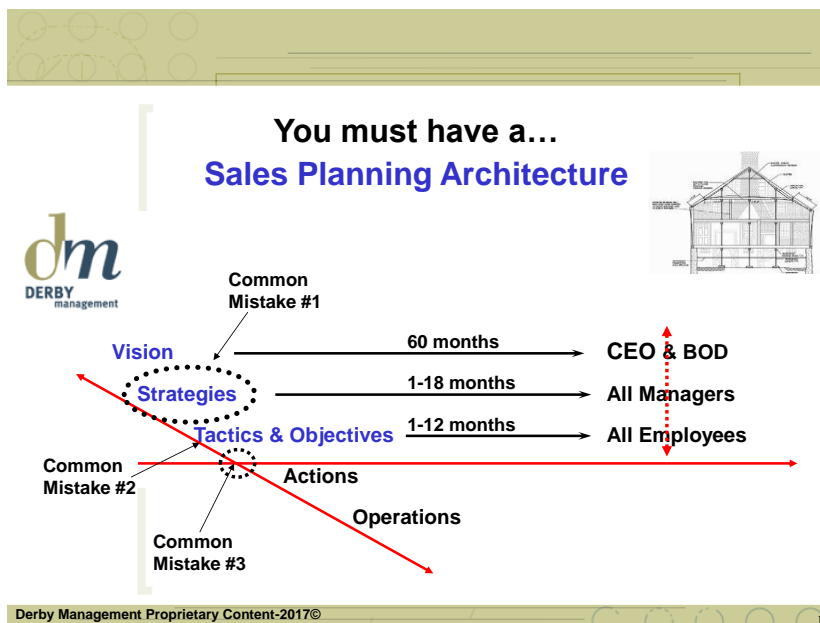
***“In preparing for battle, I have always found that plans are worthless, but the planning process was indispensable”***, and he was absolutely correct as that thought process applies to battles in war and to the annual and quarterly sales victories we achieve in taking territory, defeating competitors and winning more customers.

At a very different level, it was Mike Tyson, the controversial boxing athlete, who simply said...

***“Everyone has a plan, until they get punched in the mouth”***

Somewhat by definition an annual sales plan constructed in November of any year during the annual budgeting process, which looks out on how prospects will be thinking and what existing customers will be doing 12 and 18 months into the future is “somewhat” useless. That having been said, the actual process of bringing the plan together with the sales team and the detailing that is necessary to work through all the future products, all the personnel hiring decisions and all the integration and support that will be required from Marketing, Operations, Engineering and Customer Success is the indispensable part.

As to where Sales Plans “fit” in the completion of your company’s annual Business Plan, the one that is officially approved by your Board of Directors and therefore becomes the yardstick against which all activities and results will be measured, note the graphic below, which is a slide from our annual Sales Management Boot Camps, as a means of providing you with a possible architecture to keep in your head when you’re going through this annual and quarterly planning process.



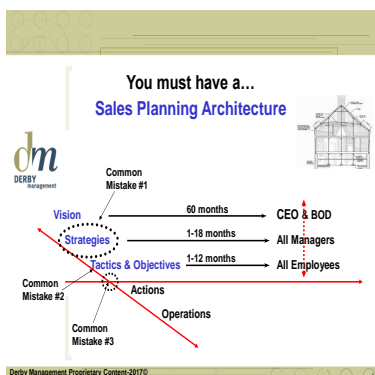
The words that go with this slide point out that your Sales Plan should be a mix of Strategies (the primary sales *directions*) that you plan to follow over the next 12 to 18 months and then the monthly and quarterly sales tactics that will fit into those primary directions.

That’s the planning architecture part.

“**Mistake #1**” above refers to the fact that many companies just skip over the setting of the strategies part and jump right into tactics. Setting strategies, better defined as “primary directions” is tough. Coming up with those strategies is the easy part; making decisions on a small number of priority strategies is the tough part.

“**Mistake #2**” identifies that too often the actual tactics are not backed up with detailed objectives or KPIs. Planning out the tactics that fit directly into and give detailing to the primary strategies that have been agreed on is critical, and nowhere is that tactical planning more critical than in the world of Sales.

Let’s say that a strategy that the management team has worked through and agreed to invest time and money into is changing the way that the company sells to national accounts in a territory. Ok, a good strategy, and one that every growth company needs to deal with in answering the question of whether Sales goes after a nationwide or a global account on a total geography basis of the entire country or go after individual locations of the account within the region. Let’s say the account was Tyson Foods, a national and international brand. Do we sell at a national level, setting prices and figuring out sales for each region from central headquarters, or do we do this on a region-by-region basis, or sell each plant location separately? Or do we do all three? And, what does the customer want us to do and what would be best for them? The answer to that complex-and very common-question then becomes the strategic part. The tactics both nationally-and especially within the individual



territories and at the plants themselves-then will be developed as a result.

**“Mistake #3”**, which I am sure will never happen with you, is that too often salespeople do not take time out of their very busy schedule to actually plan out the Actions & Operations below the red line. In our work with sales management, we like to recommend that a sales team should be spending 90% of their time below the red line actually selling and 10% above the line, both as sales managers and as salespeople, planning out what is going to take place.

We created this graphic in order to quickly visualize the differences in the words **“Vision”**, **“Strategies”** and **“Tactics.”** Management’s primary responsibility is to create a totally integrated balance within this architecture. Too loose a Vision or too many Strategies, and there’ll be chaos since tactics will not tie together. Too few Strategies or only marginally effective Tactics will not create enough growth.

Key points:

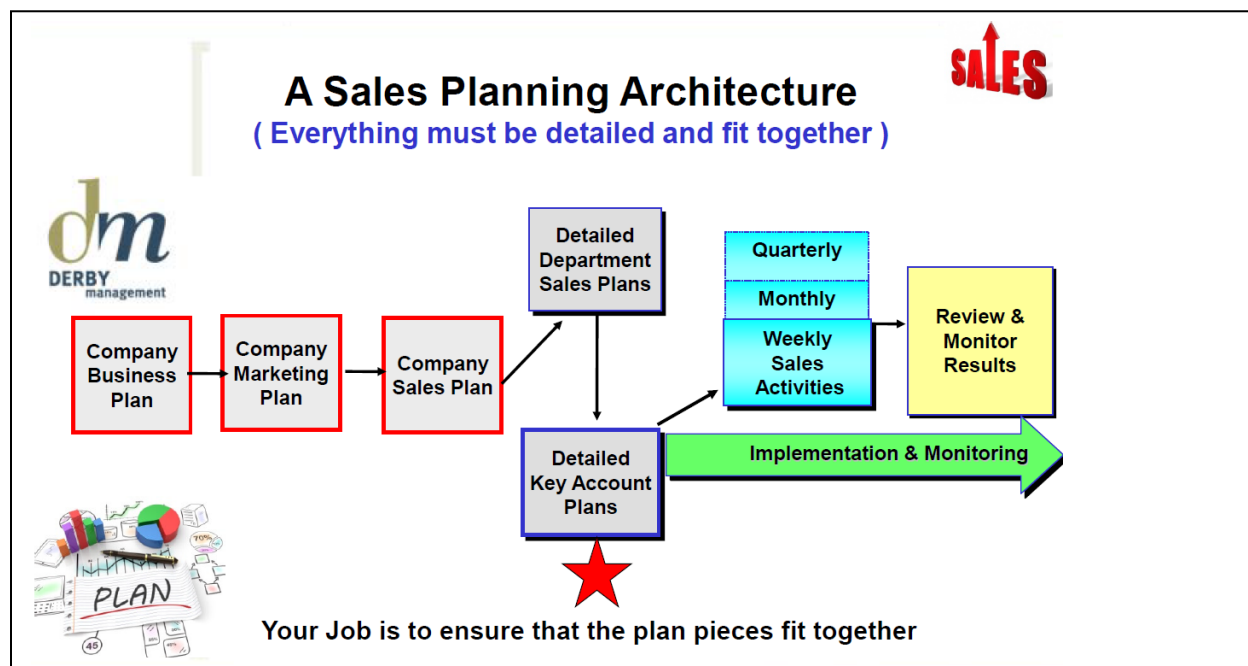
- All **Tactics** have **Objectives**.
- All **Objectives** have dates and metrics.
- **Activities** are where the rubber hits the road.

What you can manage best on a monthly and quarterly basis are your team’s **Activities**. Often, in the heat of the battle, we know that *all* you can manage are your **Activities**, which is fine. Don’t overthink this, and focus on what you can more easily manage, and that will always come down to monthly and quarterly **Activities**. The rest is all “just” a framework. There are no set rules about the timelines for Visions, Strategies and Tactics, but here are a few guidelines that we have found useful over the years in conducting 30-40 sales strategy planning sessions every year.

- Visions should probably look out 36 to 60 months. Don’t waste time with a ten-year vision. Today, too many market changes, plus and you have a business to run... *today*.
- Strategies are critically important and most useful if they look out 18 to 24 months.
- Tactics typically work well if they are locked into your quarterly operating plan for 12 months.

There may be 10-year visions somewhere—indeed, one of our primary clients, Steinway & Sons, in business for 165 years, clearly has a well-defined vision, and at Reiser, where I’m Chairman, we have a 50 year vision that serves us well, but typically, visions morph over time and certainly strategies and tactics will change significantly over three years.

Let's take another look at this word, "architecture", since at various times as a salesperson, a sales manager or the person in charge of all sales in your company, you need to balance your time, your planning and certainly your energy between planning and doing, which is the purpose of the graphic above. The graphic below-borrowed from one of our Sales Management Boot Camps-provides you an opportunity to think through just where your sales plan fits in the scope of planning for the business overall.



- Most importantly, the business plan for the company provides the overview of what the current status is and where the company is headed over the period of the next year or two. Since this is a consistently updated document, quarterly and six months are mandatory and full buy-in by all of the senior managers, including, of course, sales management, are full requirements for any successful business.
- Next in line is the company's Marketing plan since it will set in place the market opportunities, the prospective customer needs, the ever-present competition, the future product and service requirements and an outline of the marketing tactics and accompanying budgets which will be required. It is from this document, in total collaboration and partnership with sales management that forecasts will be jointly owned, and it will be the foundation of the company's sales plan as to where and how the company will go to market.

All of which brings me to why we wrote this guide. Is the guide perfect? Absolutely not, and very different from our award-winning ebook on **“Writing the Winning Business Plan”**, with thousands of downloads and used at MIT, it does not have 20 years of revisions, updates, and professional editing from our both our customers and our partners.

In this third edition of **“Writing the Winning Sales Plan”**, our intent is to provide you with a guide, perhaps an outline and maybe a template, but the real intent is to get you to think, to bring together your sales team and the salespeople from other teams and work through the process of planning out your sales strategies and primary tactics for at least the 12 months of 2020 and then being able to step back and fill in the details of all your tactics, your quarterly activities and the required operational technology and tool support details that you will need to reach your quota plan this year.

***“It’s the planning process, not the actual plan that counts the most!”***

Therefore, if you find that all of the levels of plans identified here are too complex or simply too many, then eliminate what you don’t need and just focus on two sets of plans: your overall annual sales plan for the year and then individual Key Account Plans-if you’re a manager-for your salespeople. As one of our best heads of sales anywhere, Chief Sales Officer, [Colleen Honan](#), one of our small number of 1%, constantly focuses on “The Plan to Make Plan”, which we will outline some of her principles later in this book.

At any time, if you have comments, questions or want to add your own content to this, just connect with me by email or through Linked In, and we will set up a time to talk in the short term.

Best of Success in your sales planning,

A handwritten signature in black ink, appearing to be 'Jack', written in a cursive style.

[Head Coach, Derby Management Site](#)

- Sales & Marketing Productivity Experts
- Business & Strategy Planning Specialists
- Senior Management Coaches

[What We Do & the Value We Add](#)

Professor of the Practice, [Tufts University Center of Entrepreneurship](#)  
Prior Director of the Center and the Cummings Professor of Entrepreneurship

## The 8 Step Sales Plan Outline

1. Analyze Sales Performance” by District/Region/Territory
2. Identify “Opportunity” (High Potential /Low Performance) Territories
3. Establish total company and regional Quarterly Sales Objectives
4. Establish Regional Quarterly sales objectives
5. Develop Sales Strategies and Tactics for each Customer Segment
6. Develop a Quarterly Regional Action Plan (The 30-60-90 Day Plan)
7. Identify National Key Accounts and Develop Key Account Plans
8. Develop a Key Account Plan for each of your Key Accounts

The process I want to bring you through is one of creating these various plans and doing the thinking old school, whether that’s on paper, thought through by whiteboarding or developed within the architecture of a PowerPoint deck.

Let’s first get your ideas down, thought through by yourself or with a peer or with your boss, whatever is the best way for you to work through your own planning.

Once the foundation is set, perhaps the primary tactics are identified, and you’re starting to think through the actual activities, then we can transfer all of this over to your CRM and any other apps that integrate into your CRM.

I just want you to think all of this through first before you start moving through filling in the blanks on your CRM templates. I am a strong believer in CRM platforms and the more useful apps that tie in that make my life easier and save me time, the better it is for me! Having said that, I recommend that you first do the actual planning, then move that over to the structure required in your CRM.



## Definitions

An important tactic when you are developing your sales plan is to make sure that everyone uses the same language. That language is totally up to you, but the language definitions are whatever you say they are. Once they are established, enforce them everywhere. Formality and discipline are key components of your sales plan, and *no one* should be allowed to color outside the box. The profession of Sales is just that, *a profession*, and whether it's the Navy Seals, the New England Patriots or your certified auto mechanic for your Ford or my Subaru or your sister's Corvette, there are specific rules, processes, tools and measurements that then become "*the [name of the company] way*".

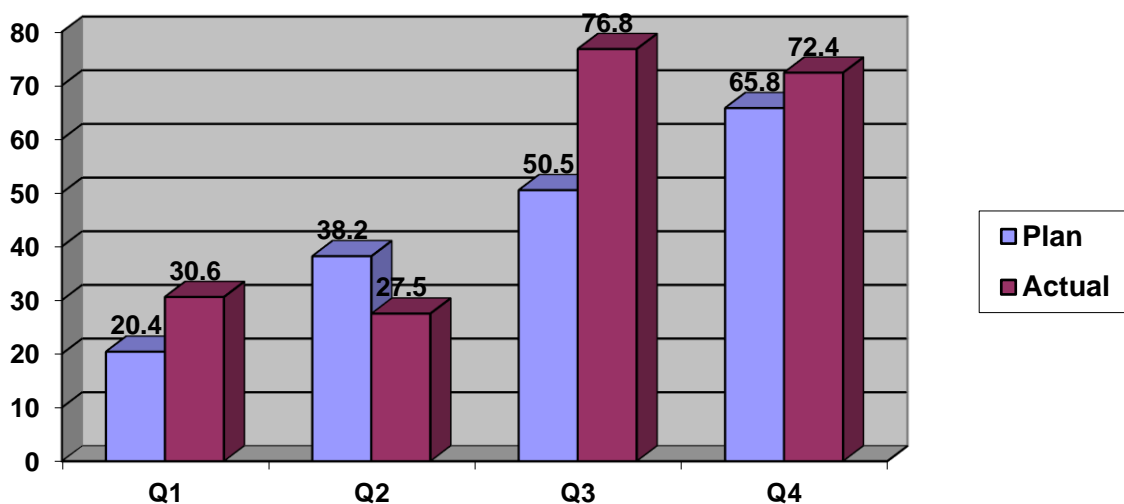
Why would you allow your salespeople to do anything differently? They will become "certified" to "*Your Way of Selling*", or they simply won't be allowed to stay on the team. Common language is a very basic part of that discipline, and the following terms are our own. You should develop your own vocabulary and then insist it is used everywhere from the field to the boardroom.

- We use "**Objectives**" rather than "goals".
- We use "**KPI's**" for Key Performance Indicators.
- We use "**Business Plans**" for officially approved Business Plans by the Board of Directors and "**Sales Plans**" for annual sales plans submitted by the Chief Revenue Officer or VP Sales and approved by the CEO having been fully agreed on by everyone on the SLT.
- We use "**Quota**" for Sales Plans revenue or bookings volume. We know from hard lessons-learned that the quota amount needs to be a minimum of 15% (preferably 20%) more than the Business Plan number.
- "**Tactics**" are fundamental quarterly annual plans, and "**Activities**" are the action items.
- **Customers & Prospects**. We actually do understand the difference but tend to mix the terms in our talks since the ideas, the strategies and the tactics apply to both.
- "**New Customers & Prospects**" refer to totally new logos. "**Affiliated New**" refers to a potential in another division of the corporation where you already have some level of existing business. "**Existing**" refers to just that-business that will both come in by itself and business which the rep can trigger through expansion of existing or upselling new products or services.
- "**Call Plans**" refers to calls, emails, video chats and direct F2F visits.
- "**Regional**" encompasses "Regions", "Districts" and "Territories",
- "**Key Accounts**" follow the 20%/80% or the 10%/90% rule. These are the top potentials.

## Analysis

### 1. Analyze Sales Performance by Region / Sales Rep- (Use graphics everywhere you can)

- Utilize charts, graphs or bullets to analyze sales performance to the Quota Plan.
- Analyze sales detailing at the level that makes sense for you as the Sales Manager.
- Use examples from your company's Toolbox or your own graphs from your CRM.
- Analyze sales performance compared to Quota.
- Analyze sales performance compared to primary competition.



**All your graphics must be generated out of your CRM. BTW, your only choices *should* be...**

- **SFDC-Salesforce.com**
- **MSCRM-Microsoft CRM**
- **[Hubspot CRM](#)-our preference.** Give any of us a call, and we will talk about this.

Also, with all of these metrics, and the actual sales performance against them, you want to transparently display them in real time everywhere around your office walls and easily accessible online anytime anywhere.

## Focus on the Win Through the High Opportunity Regions!

### 2. Identify “Opportunity” (High Potential/Low Performance) Regions

At the same time you’re doing the analysis and identifying the high opportunities regions, start noting down the specific high potential accounts in those same regions.

**Objective:** Identify those territories that are underperforming and have *large* potential to grow market share and sales revenue or bookings or whatever KPIs you’re using.

**Planning Tips:** You should also utilize this format to identify the **“Middle Performing Regions”** where you can grow the business through standard blocking, tackling and solid execution plans.

Do the same especially for the existing **“High Performing Regions”**.

These plans are all detailed and text, metric-heavy and graphically accurate written plans. There is nothing general or fluffy, and the “hope” word is not only never used, it is never thought. These documents are full battle plans for each of the high performing regions and they include your Key Account Plans for the high potential accounts.

Ideally, there should be three types of Sales Plans within each Region, but if this is your first or second time going through the rigors of this process, I recommend that you focus only on creating Sales Plans for your **“Key Accounts”** for which you’re going to apply the 80/20% or better yet, “The 90%/10% Rule” in which 80% or 90% of your results will come from 20% or 10% of your accounts.

- **“High Opportunity Plans”** are for “High Potential/Low Performance Regions”. This term also applies to **“High Performing Accounts”**, all of which would be termed **“Key Accounts”**.
- **“Grow-the-Business-Plans”** are for the middle-of-the-road-existing customers which have significant expansion opportunities. They are also for **“Affiliated New Accounts”** which are other divisions or other locations in that same corporation. If you are doing business with one department or division within Ford or Cisco or Fidelity, for example, and that business is going well, then getting into another division should be a much shorter sales cycle with a reference from your currently satisfied buyer in a sister division or location.

- “**Customer Retention Plans**” are for existing customers, large or small, with little in the way of expansion opportunities. Your strategic questions here are in the building of your sales and “customer success” models in whether these accounts will be handled by “**Customer Success Reps**”, or your “**Sales Account Managers**” (titles typically given to salespeople focused on retention and expansion) or by your “**Sales Executives**” (SE’s, for short, and a title frequently used by new business reps). Don’t be overly concerned about the definitions of these titles since they will ultimately be defined by you, and you will call these various groups whatever works for your vocabulary and the rest of the management.

Now you *just* need to figure out where you’re going to spend your time as a manager-with which salespeople, in which regions, and for which accounts. Here’s a bit of advice based on 30 years of doing it both the right...*and the wrong* ways.

### People

- Focus your time on your best “A” level salespeople. They will always produce more.
- Focus your time also on your B+/A- level salespeople. Your coaching will pay off quickly.
- Train, challenge and recertify your B/B- players to become B+/A- in six months.
- Terminate and upgrade the rest. You simply don’t have the time as a Player/Coach/Leader

### Regions

- Focus your time on the **High Opportunity Regions** but be very careful if they represent major logistics challenges in terms of difficult distances to travel in or have heavy competition.
- Use the strategy of “**Streets not States**”. There is not much reason that a \$10 million business, with six salespeople for example, should have their salespeople divided into the regions of the Northeast, Canada, the Southeast, the Midwest, the Southern California and Northern California. That might look good on a wall map, but you need to think through geography strategically, and most importantly, tactically. A better alternative could very well be from the standpoint of your sales efficiency and the customer’s support effectiveness to have one person in NE, one in NY City through Albany, one in North New Jersey/Midlantic, one in the Carolinas and one in Atlanta and one in Chicago or LA. One of our most successful businesses and investments was in a company that grew from \$8 to \$120 million in eight years with a highly commoditized and competitive product and only sold in New England. Due to the tight geography our coverage was excellent!

**3. Establish quarterly objectives for the entire business for the entire year.**

This example below is for New/Affiliated New Business. A different plan would be developed for existing business (expansion and retention). For each product, select one or two Key Performance Indicators (KPIs) to measure on a quarterly basis. Examples might would be Revenue, Margin, Unit Volume, Market Share, New Logos, Bookings and/or Retention. If you are using Revenue or Bookings, and then there are sub-divisions of those into terms such as “ACV”/Annual Contract Value and “MRR”/Monthly Recurring Revenue, both heavily used in the subscription business, then define those exactly in your quarterly sales plan.

**3.1 This table example is by Product/Quarter/All Customers**

<b>KPI Measurements Both sales metrics &amp; KPI's</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Total</b>
Product #1					
[Detailed text here with explanations of what the metrics mean]					
Product #2					
[Detailed text here with explanations of what the metrics mean]					
Product #3					
[Detailed text here with explanations of what the metrics mean]					

### 3.2: Establish Quarterly New Customer Objectives

This example of a table is for both “New Logo” and “Affiliated New” accounts but not for “Upsell Business from Existing Accounts”. The reason for this is that we like to keep the primary selling focus on “New Logo Business”. Having said that, this table could very easily incorporate what is here plus Existing Customers if there are subscriptions or maintenance revenue monthly. It could also have a row for upsell and expansion revenue or bookings.

What you want to achieve in this process is one clear snapshot of where you want to strategically focus for these monthly / quarterly time periods, and maybe another snapshot for everything in total.

Customers	Jan	Feb	Mar	Q1	Apr	May	June	Q2	July	Aug	Sept		Q3	Oct	Nov	Dec	Q4	Total
Prior Year Reference Point																		
New Logo																		
Affiliated New																		
Total																		

This table should be in dollars, and there could be a separate table for units depending on the ASP and the importance of the metric. A high ASP, for example, might also be defined in terms of units just to sharpen the focus, but ultimately everyone is going to be measured by quota dollars for either bookings and revenue and/or margin or all of these.

“New” is a brand-new logo customer.

“Affiliated New” is an added division or added department from an existing customer where a totally new sales process needed to take place. This is not an “upsell”, but it could be “an expansion” as long as it represents a new sales process with a separate decision maker, but that the process took place because the sales rep had used their existing relationship with a key decision maker at the existing customer account to ask for a proactive reference point or an actual introduction to an affiliated division or business unit within the corporation.

**3.3 Establish “New Customer” and “Existing Key Account Objectives” by product and then establish regional quarterly sales objectives**

This table will be customized to meet your individual requirements, or you can insert your own objective setting format. The importance of this table is to now focus on the Regions/by Product/by Objectives

Region #	Q1	Q2	Q3	Q4	Total Yr
Product #1 Objectives					
[detailed text here]					
Product #2 Objectives					
Product #3 Objectives					

### 3.4 Summary Results by Region

Once the Region’s objectives by Product by Quarter have been detailed, which is both critical and tough work, you want to take a snapshot of what this means to you as a manager or as a salesperson in terms of dollars and maybe units.

**This table’s value** is to provide an overview of dollars or units (if it makes sense, and especially if you have a relatively high ASP and relatively low unit sales), or both, in order to merely take a snapshot of the growth required for a 12-month picture

Customers	Jan	Feb	Mar	Q1	Apr	May	June	Q2	July	Aug	Sept	Q3	Oct	Nov	Dec	Q4	Total
Prior Year																	
Existing Baseline if any																	
New																	
Affiliated New																	
Expansion & Upsell																	
Total																	

In a tech company, for example, it would not be unusual to see 30% to 60% annual growth numbers in units and in dollars. Just as one example, the impact of that visual is important in terms of hiring criteria since it takes 90-120 days just to recruit and hire experienced sales reps, then another 90 days to formally onboard that individual and another 12 to 18 months before that person is fully ramped up to top productivity. Yes, that’s correct: 12 to 18 months to get fully ramped up!

Other examples of the potential use of this table would be for adding personnel in Customer Success or in Operations, but the key use is for the salesperson and the manager to have a visual for planning and for impact



**4.0: Establish Monthly & Quarterly Region = Sales Objectives.**

This table provides a different way of looking at your Region

Territory by Product	Jan	Feb	Mar	Q1	Apr	May	June	Q2	July	Aug	Sept	Q3	Oct	Nov	Dec	Q4	Total

**5.0 Identify Sales Strategies and Tactics for each Customer Segment**

**Example:** Customize what is below to meet your individual requirements

Segment	Strategies for Segment	Sales Tactics/Action Plans for each Segment
This could be by product or market sector or customer or persona	Strategies would include... - “Primary Directions” -“Major Initiatives” -“Fundamental Building Blocks” in markets, geo, customer focus, persona shifts or products	Tactics are fundamental quarterly and annual plans and Activities are the action items that need to be done monthly <ul style="list-style-type: none"> <li>• Increase call frequency to 8x/month</li> <li>• Send to National Speaker training program</li> </ul>
	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>
	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>

**6. Each Sales Representative develops and writes out a Quarterly Region Action Plan**

**Planning Tip:** This template will, of course, be customized by the VP of Sales, and the same template will be used by each Regional Manager and by each sales rep in the territory. There will be an overall annual Sales plan, but the most critical component, which will get detailed later will be **“The 30-60-90 Plan**, which is your Quarterly Action Plan. This is where the rubber hits the road, and without it, there’s just words. big ideas and lots of talk and arm waving.

## Regional Sales Plan Template

### The 5 Steps to Creating a Winning Regional Sales Plan

<b>Step 1</b>	<b>Analyze Region</b>
<b>Step 2</b>	<b>Analyze &amp; Set Objectives for all Key Accounts</b>
<b>Step 3</b>	<b>Identify a minimum of 10 Key Accounts that require individual Key Account Plans (Use Template)</b>
<b>Step 4</b>	<b>Set Region Objectives, Strategies &amp; Action Plans</b>
<b>Step 5</b>	<b>Take Action &amp; Measure Region Results</b> At the beginning of each new quarter look back and formally review the results for <b>“What were the Best Practices” that we can use again?</b> Then... “Wash-Rinse-Repeat”

**Beginning of a Written Region Action Plan Template**

<b>Region Action Plan</b>
<b>Name of District/Region</b>
<b>Name of Sales Rep</b>

**Region Name & Location**

**Date**

**Step I: Analyze Territory**

At various places in this written sales plan, for the purpose of providing an example, we have used a medical device product sold to hospitals of various sizes of bed capacity.

Summarize the following Regional information in two to three concise paragraphs. Make sure that this is detailed and write it as if you needed to hand it off to your replacement because you were promoted to another position in the sales organization. My point here is just to put down as much detail as is possible since this is going to be a living plan, and, it just may be that you get promoted, and there should be solid history in your CRM for everything you have done.

- Sales Potential
- Geography/Size of Territory
- Account Analysis: Retained, New, Lost, Recaptured
- Treatment Protocols used in Territory
- Market & Competitive Information
- Demographics
- Number of Accounts by Segment
- Reimbursement/Payor information
- Overall Company Product Usage
- Perceptions

**Step #1: Record the Territory Sales History for the prior year.**

Total Year Sales Results	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Quota Plan					
Actual Results					

Also, provide at this point all the market research data on this region or at least what it is on a national scope. This data always exists somewhere, or there will be data of a similar product or service

**Step 2: Analyze & Set Objectives for Key Accounts**

Analyze & set objectives for Key Accounts that represent 70-80% of Sales (the most profitable) or have “High Sales Potential” for the upcoming year. Use the 80/20% or the 90/10% rule here.

You will note the word “connect” here, which might be a F2F, a call, an email, a text, a video chat, a LinkedIn inmail, a Facebook Message, or a Skype. Whatever it is, you want to count frequency. Why? It’s the only way that you can plan, use your time and then forecast accurately!

**Examples of Criteria used to define a Key Account:**

Key Account Classification Criteria	Key Account Screening Criteria
<ul style="list-style-type: none"> <li>Customers responsible for 70% of revenue</li> </ul>	<ul style="list-style-type: none"> <li>Ability to sustain long term profitable relationship (\$X net over Y years)</li> </ul>
<ul style="list-style-type: none"> <li>Customer with over \$ 1.5 million of sales.</li> </ul>	<ul style="list-style-type: none"> <li>Account values Company products and services to be distinct from competition</li> </ul>
<ul style="list-style-type: none"> <li>Customer with potential of (an example) of \$1.5 million of sales over 2 years</li> </ul>	<ul style="list-style-type: none"> <li>Relationship has strategic value or adds to quality of the company</li> </ul>
<ul style="list-style-type: none"> <li>Customer generates \$800,000 profit</li> </ul>	<ul style="list-style-type: none"> <li>Company can create differential advantage by serving the customer</li> </ul>
<ul style="list-style-type: none"> <li>Customer responsible for of x% of the market in units or value</li> </ul>	<ul style="list-style-type: none"> <li>Company can create considerable barrier to entry by serving the customer</li> </ul>
<ul style="list-style-type: none"> <li>Opinion leader influences 20% of prescribers</li> </ul>	<ul style="list-style-type: none"> <li>Potential for growth is greater than the current major customers.</li> </ul>
<ul style="list-style-type: none"> <li>Customer with contribution of &gt; 5%</li> </ul>	<ul style="list-style-type: none"> <li>Customer relationship based on more than price negotiation.</li> </ul>

Key Account Name Min: 10 Go for 20	Potential Sales by Quarter	Competition Market Share Ideally in %, but can be very general	Our Market Share	Quarterly Sales Objective	% Sales Contribution	Segment Current Objective	Current Connect Frequency	Connect Frequency Objective
1.								
2.								

**Step 3: Identify the 10-20 Highest Sales Potential Accounts**

These would be "Key Accounts" that require complete written Key Account Plans (KAPS)

**Key Account # 1:** \_\_\_\_\_

**Sales Potential:** \_\_\_\_\_

**Company Share:** \_\_\_\_\_

Don't get hung up on the exact % if you don't know, guessing is better than nothing

**Competitive Share:**

Don't get hung up on the exact % if you don't know, guessing is better than nothing

**% Territory Sales Contribution:** \_\_\_\_\_

**Sales Objectives for this year:** \_\_\_\_\_

List the primary objectives here

**Connect Frequency Objective for this year:** \_\_\_\_\_

Note this in monthly averages and in a total



**Step 4: Set Region Objectives**

- ✓ Establish Monthly Sales/Market Share Objectives for the Region for this year
- ✓ Measure Actual Results on a Monthly and Quarterly basis

Total Year	Month 1	Month 2	Month 3	Quarter
Sales Objectives				
Actual Results				
% Attainment				

## Develop a “Connection Plan”

This plan is developed by customer segment where you will measure actual results against your quarterly objectives for every one of your key accounts. Here also, your ‘connection’ can be calls, emails, text, video chat, LI, FB or anything else. Linked In is preferred by us, but anything used must be directly tied into your CRM as a connection. Connects must be measured as a two-way connection- “I sent something; I received a response”-not just “a send”

### Sample Connect Plan:

**Note: The Sales Rep calculates available connects to make sure the Connect Plan is realistic.**

**Total Available Connects = Days available x Daily Connect Average: \_\_\_\_\_**

**Example:** 20 working days in the month X connect average of 10/day = 800 available Connects. The monthly Connect Plan then requires 800 Connects. The Sales rep will need to increase their Connect average to make their total targeted Connect plan realistic. It is recommended that the Sales Rep develop a Connect Plan for each Key Account they plan on talking with or traveling to at the beginning of each month. Obviously, most of their time should be spent with the high volume or high potential accounts. In parallel with these Connect Plans, travel plans need to be laid out in rolling 30, 60 and 90-day time blocks.

<b>Customer Segment</b>	<b># of contacts to connect with at each KA</b>	<b>Target Connect Frequency</b>	<b>Total Targeted Connects/ Month</b>	<b>Actual Connects Month 1</b>	<b>Actual Connects Month 2</b>	<b>Actual Connects Month 3</b>
"A" Accounts	6-10	4-6 month	20-60 for example			
Next priority Key Accounts	4-6	3-4 month				
Next priority Key Accounts	4-6	2-3/month				
Next priority Key Accounts	4-6	2-3/month				
Next priority Key Accounts	4-6	2-3/month				
Next priority Key Accounts	4-5	2-3/month	8-15 for example			
<b>Totals</b>						

## Establish Region Action Plans- Medical Product Example

Step 4: Set Action Plans	Develop Strategies	Develop Action Plan	Budget \$ Planned Date	Take Action \$\$\$ Date	Step 5: Measure Results/ROI
<p>1. Develop 1 new Thought Leader/Speaker</p> <p>Potential Speakers:</p> <ul style="list-style-type: none"> <li>• Dr. Smith</li> <li>• Dr. Jones</li> <li>• Dr. Grant</li> </ul>	<ul style="list-style-type: none"> <li>• Provide Slide Deck</li> <li>• Speaker Training</li> <li>• Provide latest abstracts &amp; reprints</li> <li>• Become accredited</li> </ul>	<p>Have Smith, Jones, &amp; Grant attend the Training Program in Orlando and meet with Director of Engineering to review the latest publications.</p>	<p>Budget: \$2,500 May</p>	<p>Actual Cost: \$2,250 plus \$2,500 T&amp;E</p> <p>Held May 20<sup>th</sup></p>	<p>Incremental Sales = \$100,000</p> <p>ROI =200% (\$100K/\$5,000)</p>

(End of Territory Business Plan Template).

The next few pages, taken from our Sales Management Boot Camp programs, provide you with an example of “another view” of a sales planning process using a series of PowerPoint templates that provided an easy-to-do, easy-to-review, common methodology within a sales team. Although seemingly easier to accomplish and display, the homework and the detailing necessary to get to this view requires the same amount of planning effort, discipline and detailing.



### Example #1



- Business system software & services
- Sold to hospitals
- Very rapid growth
- Value proposition: ROI, billing
- Your planning format: **Only 5 sections**
  1. Segment customers
  2. List Key Accounts
  3. Assess competitors
  4. Detail quarterly objectives
  5. Detail monthly and quarterly tactics



### Quarterly Plan Example-Step #1-Segment



#### 1. Segment Your Customers

1. There is not much to do here.

- This is a listing of the specific market segment types which are available

- It should begin every Plan since it is a strong visual reminder as to your sales focus for this period.

Segment Name	Segmentation Characteristics	No. of Beds
Teaching	Major urban teaching hospital in one of the key 18 cities	750
Large Urban	Large urban hospital, but not affiliated with a university	500-750
Community #1	• Located outside of the urban geography, but directly affiliated with a university	300-500
Community #2	• Located outside of the urban geography, but not affiliated with a university, but part of an IDN	300-500
Large Group >10 docs	• Large Group Practice directly associated with a Teaching or Large Urban	N/A
Small Group	• 5-10 physicians	N/A



## Territory Plan Example-Step #1-Segment



### 1. Segment Your Customers Focus Your Plan

- What you would do here is to fill in the % of your your bookings or sales that you have achieved YTD and highlight the segment or two that you are focusing this plan on. It may be the exact same for the past period or you may be changing your focus to an added segment

Segment Name	Segmentation Characteristics	No. of Beds	Current YTD %
Teaching	Major urban teaching hospital in one of the key 18 cities	750	9.1%
Large Urban	Larger urban hospital, but not affiliated with a university	500-750	12.8%
Community #1	-Located outside of the urban geography, but directly affiliated with a university	300-500	29.7%
Community #2	-Located outside of the urban geography, but not affiliated with a university, but part of an IDN	300-500	48.4%
Large Group >10 docs	-Large Group Practice directly associated with a Teaching or Large Urban	N/A	0%
Small Group	-5-10 physicians	N/A	0%

In this example, the account manager is going to continue to focus on Community #2, but they have also decided to make inroads into the Large Group Practices



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## Territory Plan Example-Step #2- Key Accounts



### 2. List Key Accounts

- Use simple language
- Use clear definitions
- Use metrics & data
- Who is the targeted prospect or the existing customer?
- What are their key needs for this time period?
- What would be the expected dollar value if you were able to close them during this period?

Prospect or Customer	Key Needs	\$ Value to

Key Accounts should follow the 80/20 % Rule  
Maybe even 90/10%



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## Territory Plan Example-Step #2-Key Accounts



Prospect or Customer	Key Needs	\$ Value to
Winchester Hospital	Their existing Meditech system is ancient and not integrated to their billing and coding system. They are looking at both replacing their entire enterprise or doing so on a department by department basis. Their biggest pain point currently is their Orthopedics Department where they are losing patient data. Orthopedics currently is the busiest department in the hospital due to their heavy marketing campaign last quarter	\$ 100K for an Orthopedic module only. Sales cycle would be 180 days.
NE Ortho	This would be a new account and a new entry into the Large Group Practice segment where I have a quota requirement of opening two accounts per quarter equaling \$25K for the 1 <sup>st</sup> quarter and \$50K/quarter for the balance of the year.	\$10-\$15K for a standalone. \$7.5K if tied to Winchester Plus \$10k in training.



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## Territory Plan Example-Step #2-Key Accounts



Prospect or Customer	Key Needs	\$ Value to
Winchester Hospital	Their existing Meditech system is ancient and not integrated to their billing and coding system. They are looking at both replacing their entire enterprise or doing so on a department by department basis. Their biggest pain point currently is their Orthopedics Department where they are losing patient data. Orthopedics currently is the busiest department in the hospital due to their heavy marketing campaign last quarter	\$ 100K for an Orthopedic module only. Sales cycle would be 180 days.
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## Territory Plan Example-Step #2-Key Accounts

Prospect or Customer	Key Needs	\$ Value to
Winchester Hospital	Their existing Meditech system is ancient and not integrated to their billing and coding system. They are looking at both replacing their entire enterprise or doing so on a department by department basis. Their biggest pain point currently is their Orthopedics Department where they are losing patient data. Orthopedics currently is the busiest department in the hospital due to their heavy marketing campaign last quarter	\$ 100K for an Orthopedic module only. Sales cycle would be 180 days.
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## Territory Plan Example-Step #4-Objectives

### 4. Primary Objectives (simple, easily defined)

- Annual, Quarterly, Actual to Plan-both MTD & QTD



Top 3 Primary Objectives	Plan 2017	Actual YTD QTD	30-60-90 Plan	Comments
▪ Objective 1:				
▪ Objective 2:				
▪ Objective 3:				



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## Territory Plan Example-Step #4-Objectives

4. Primary Objectives (simple, easily defined)  
 – Annual, Quarterly, Actual to Plan-both MTD & QTD



Top 3 Primary Objectives	Plan 2017	Actual YTD QTD	30-60-90 Plan	Comments
▪ Objective 1:				
▪ Objective 2:				
▪ Objective 3:				



## Territory Plan Example- Step #5-Tactical Plan



Tactic	Expected Outcome (Detail Benefits or Return)	Time-Start -Finish	Cost
1.			
2.			
3.			



## Territory Plan Example- Step #5-Tactical Plan

Tactic	Expected Outcome (Benefits or Return)	Time: Start to Finish	Cost
1. •Target Orthopedic departments in all non-Customer Community #2 Hospitals for White Paper Download results achieved at Baptist in 2010. •Work with Marketing for September launch. Must get new leads !	30 Qualified leads as a result of campaign.	Q3	<\$1,000
2. •Increase travel to 10 days per month with principal activity for Large Community Hospitals in Providence and in all CT. Bring the head of our Medical Advisory Board, Dr. Smith, to Yale New Haven and to Stamford Memorial for one symposium in each by end of October. • Research Maine Medical Center for need.	•Achieve 60/40% split for New/Existing. •Must get out of MA territory and focus on the CT geography. •Stop wasting time in VT and NH.	Q3 and Q4	\$12,000 Increased travel and hotels for CT. Run symposia at \$3,000 each
3. •Focus majority of MA time on getting into the Large Group Practices affiliated with existing MA hospital customers using their networks. • Spend 30% of September time targeting 10 practices. •Use the Brainshark module on testimonials from New England Rehab Center featuring their improvements in customer satisfaction.	•Open minimum of 6 new Group Practices.  • Show specifically that "Meaningful Use" can be impacted as a result	Q3 and Q4	<\$1,000

Again, what's been directly supplied above is just another template example shown to provide you with a different view of a Sales Plan structure. The key takeaway in either of these templates is to have the sales rep...

- Take a quarterly detailed view of their territory and their high opportunity key accounts
- Define the activities for both the quarter and the month into 30-60-90-day periods
- Identify metrics
- Focus on what they can totally control, which is only activities.

As you will note, the key to success in this is getting the results that you want for each quarter detailed down into 30-60-90-day activities. Very simply, you can never get results without detailing the activities. All plans get sidetracked, and often, as Eisenhower said, *"it's the actual planning process that is most important."*

## Process-Tools-Technology-Math

This phrase of **“Process-Tools-Technology-Math”** is one that I and my partners use many times every day when working with customers and I use all of the time in teaching my courses in Marketing and in Sales. We apply the same exacting principles of bringing operating processes with individuals steps, tools that tie into those steps and technology always integrated into the company’s CRM platform, that have been used in manufacturing, engineering and quality control systems in corporations for decades.

When properly introduced and bought into by the sales team, success has been measured by increasing the productivity of the salespeople by a minimum of 25% and the effectiveness of increasing customer value by another 25% plus.

For the purpose of this document, which is primarily to provide you with an overview of how to construct sales plan, what we have done below is to provide a slide from our Sales Management Boot Camp in order to give graphic representations of what a typical Sales Process would look like. Every sales process would be customized to the requirements of the individual company and the market requirements of the customers. Typically, the initial steps of Qualify, Discovery and Validate will always be in place although they may be titled differently, and then there will always be a “Close” step. What lies between these two groups would be heavily customized by the sales management of the individual company.

### Roles & Responsibilities in the Sales Process



- Sales Funnels will typically have 5 to 7 steps always starting with a “Qualify” and ending with a “Close” step.

- “Scouts”, who are BDRs will work the top part of the sales process qualifying marketing and sales leads.

- “Hunters”, who are Account Managers or Account Executives, will work the bottom part of the process.

- “Farmers” or Inside Sales or Customer Success Manager will work the post sales activities

After working through the development of the steps and their accompanying tools that go into each step, all of this process is embedded directly into Salesforce platform which then is used to provide the planning and performance metrics that move from step to step. What is outlined in the graphic above are basic examples of some of the most critical tools identified here as a “Discovery Checklist” and a “Business Use Case”. Again, each company would come up with its own vocabulary to be used by everyone since then the use of these tools will be measured as KPIs through the sales process.

Taking a look at the sales process and the vocabulary used by Colleen Honan, Chief Sales Officer of award-winning Brainshark, she has designed her sales process as shown below. Each of these six steps is very specifically defined in terms of their meaning, the tools in each step that are required to be used by the salesperson and, of course, the technologies, including Brainshark’s platform itself, that are embedded in their Salesforce CRM.

### Sales Stages

STAGE NAME	FORECAST CATEGORY
1 - Needs Assessment	Pipeline
2 – SA* - Discovery	Pipeline
3 - Value Confirmed	Best Case
4 - Proposal	Commit
5 – Negotiation	Commit
Pending Final Approval	Commit

\* “SA” stands for Solution Alignment

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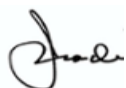
### BRAINSHARK

If you want to learn a lot more about Sales processes, just connect with us, and we would welcome the opportunity to schedule a Whiteboarding Session with you to explore what you currently have and additional opportunities for this year.

You may also want to think about attending one of our two Sales Management Boot Camps this year.

Thanks very much for reading and thinking through our third edition of “How to Write the Winning Sales Plan”. It needs work, but we think that it provides a very good foundation. Keep in touch, and if you have ideas as to what you would like to see in an enhanced editions or comments about what is here, just email me know a, with your ideas, or we can set up a call to discuss what you have in mind. I will be sure to give your ideas and comments some thought and most likely incorporate them in a major rewrite scheduled for June 2020.

**Best of Success in your 2020 sales planning,**

A handwritten signature in black ink, appearing to be 'Jack', written in a cursive style.

**[Head Coach, Derby Management Site](#)**

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Professor of the Practice, **[Tufts University Center of Entrepreneurship](#)**  
Prior Director of the Center and the Cummings Professor of Entrepreneurship