

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 both 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
- Battle Cards
- 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, and especially now in 2020 looking into 2021, there needs to be a very different approach to creating sales plans of any kind.

Simply said: the world of Sales has changed forever as a result of the pandemic chaos and the major financial impact-in some cases positive and in most negative-the virus has caused in every market. Very specifically, as salespeople we had to adapt very quickly in the first quarter of 2020 to a world that was locked down, did not permit any travel and was in a state of suspended activity as management attempted to figure out how to survive, how to “go-to-work” and how to communicate with employees, shareholders, existing customers and new prospects.

Back-in-the-day in a normal sales planning cycle, we would be developing both annual and quarterly sales plans in the fall that would then be 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 since that’s the way that I grew up as a salesguy and what I 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.

All of what we regarded as “normal” and “standard” in both our Sales and Marketing planning regimens has changed forever as have the tactics used by both departments.

- We will be not returning to many of the old sales practices of 2019
- We will continue to be very cautious of any air travel even post-Covid
- We have already realized the huge gains in time and in effectiveness by using Zoom/Teams
- Both customers and prospects appreciate their time savings with more efficient meetings
- Trade shows (the least-cost effective marketing lead generator) are most likely gone forever
- Internal meetings are much shorter and much more effective

Add to this the fact that we are still at the infancy stages of tech communication tools such as Zoom and Teams, and the significant gains that we will continue to have both in time efficiency and customer and prospect effectiveness will be very significant during 2021

Looking back again to “the old days” of 2019 and all of those prior years, there was no real “invention” in the sales planning processes for decades. The requirements and the timing were exactly the same that salespeople and their managers were required to complete every fall. And yet, what I learned from reviewing hundreds of prior sales plans was that a real annual sales plans simply did not exist in the majority of cases.

Through this process of assessing all the sales 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, by quarter and by year
- Terabytes of commission and bonus plans
- Hundreds of big bullet PowerPoints that were both strategy and objectives, but had little to do with real-world sales tactics and activities which need to be at the heart of any sales plan

...but very few real 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 “excellent” to “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 incorporating both longer range strategies and most importantly, tactical monthly and quarterly activity plans with real metrics and applicable training.

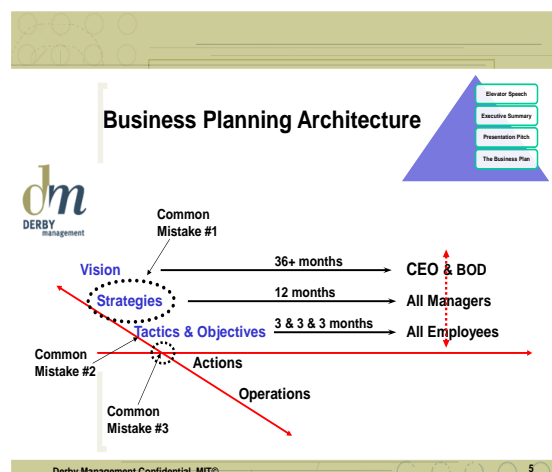
It was General Eisenhower at the invasion of Normandy who said...

“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 sales activities and results will be measured, note the graphic here, 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 months and then the quarterly sales tactics that will fit into those primary directions. Prior to 2020, we would have defined strategic plans for 12 and 18 months and tactical plans that focused on multiple quarters. Today, we are bolding stating again and again, forget strategy! Focus on 90 day very tactical sales activity plans and then when you are 60 days into that plan, begin the process again for the next 90 days.

That’s simply the reality of sales and of marketing planning in the world of 2020 and deep into 2021.

In the graphic above **“Mistake #1”** 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 very difficult. Actually, coming up with those strategies is the easy part; making decisions on a small number of priority strategies that are going to produce increasing revenue is the tough part. It’s for this reason in a Covid-world, we are just saying **“Forget Strategy!”** for now until we’ve figured out how to deal with the consistent distractions and chaos of the virus and reduce the staggering infection and death rates along with the economic impact that is being caused. Today, at the worst, we have chaos and at the best, we have distraction. Not a time for longer term strategy!

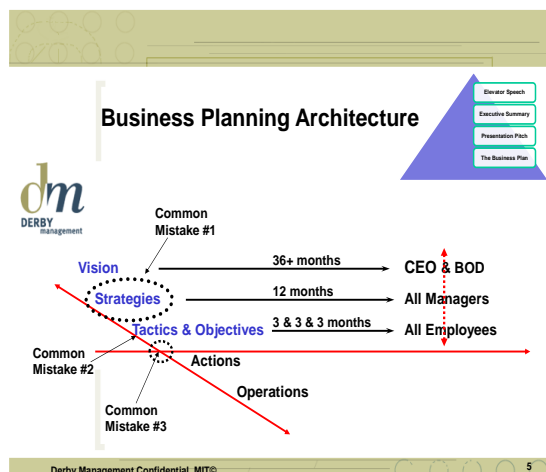
“Mistake #2” identifies that too often the actual tactics are not backed up with detailed objectives, action plan, metrics or KPIs. Planning out the tactics that fit directly into and give detailing to the primary strategies that have been agreed on is critical, and nowhere is that tactical planning more critical than in the world of Sales. Most importantly considering where we are today in a Covid world for selling in 2020 and 2021, detailed, short term tactical plans and playbooks are absolutely critical today!

That having been said, let’s just say that there is a longer-term sales strategy that the management team has worked through and agreed to invest time and money into and that is to add to the current sales model by changing the way that the company sells to national accounts in a territory. Just for a “for instance”

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 there is a major account, and that is Tyson Foods, a national and international brand. The strategic question is whether the company sells at a national level, setting prices and figuring out sales for each region from central headquarters, or does the company do that on a region-by-region basis, or sell each plant location separately? Does the company do all three? And then, of course, what does the customer want to do and what would be best for them? The answer to that complex-and very common sales strategy question then becomes a series of well-researched and planned-out management decisions. The corresponding sales tactics both nationally-and especially within the individual territories and at the plants themselves-would then be developed as a result.

“Mistake #3”, which I am sure will never happen with you, is that too often sales management and the salespeople themselves do not take time out of their very busy schedules 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 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.

Having noted the paragraph above which states “a totally integrated balance within this architecture” was fine for a pre-2020, Covid-free world, and, we know that at a point in 2021, we will return to a business world which is more balanced and finally settle on what “the new normal” will be. Today, all we know are the following:

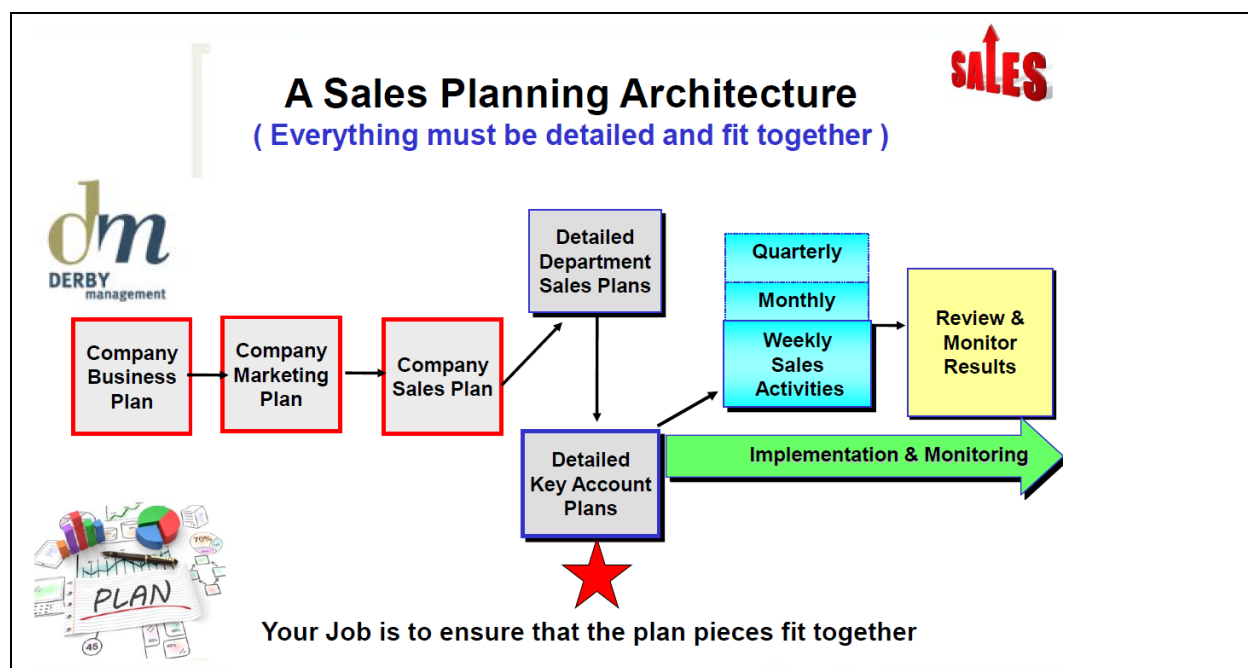
- Today there is no “new normal” nor will there be until deep into 2021.
- We are never going back to many of the pre-2020 sales and marketing tactics.
- The primary sales and marketing tools and messaging need to be 100% focused on selling value.
- Today, creating empathy and trust in our sales and marketing tactics is foundational
- They always have, but more so today, delivering perfect Value Propositions is critical to success.

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 totally 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. We’ve now updated this for a Covid world.

- Historically, **Visions** should probably look out 36 to 60 months. Don't waste your management time with Visioning now. Too many unknowns, too many market and economic changes, plus and you have a business to run this week and this month.
- When we are in a less chaotic and complex world, **Strategies** will, once again, become critically important. Previously we would have been encouraging that they primary directions would look out for 24 to 36 months. Today and through all of 2021, we are recommending only 18 months.
- **Tactics** typically work well if they are locked into your quarterly operating plan for 12 months.
- **Actions** right now are the most critical element in your sales and marketing plan and should come down to where you need to be spending the majority of your time in developing monthly and quarterly activity plan looking out no more than 60 and 90 days.

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 or a sales manager, 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 recent 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 four quarters broken into plans for no more than two quarters at a time. Since this is a consistently updated document, quarterly sales plans and consistent quarterly performance reviews are mandatory to get full buy-in from all the salespeople and managers.
- 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. Most importantly, the quarterly Marketing action plan provides the lead gen plans, timetables and coordinated SLAs between Sales and Marketing. It is from this document, in total collaboration and partnership with sales management that forecasts will be jointly owned, and it will be one of the pillars in 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? It's getting there, but not yet, plus it is also being heavily revised now given selling and marketing in a Covid World. My expectation is that we will go through another major revision in January 2021. Even our award-winning 20 year old ebook, **"Writing the Winning Business Plan"**, with thousands of downloads and used repeatedly at MIT, has now undergone two major revisions in eight months of 2020.

In this edition of **"Writing the Winning Sales Plan"**, our intent is to provide you with a guide, perhaps an outline and maybe a template or three, 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 these remaining months of 2020 into the still-unknowns of 2021 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 quarter-by-quarter sales plan for the year
- your individual quarterly Key Account Plans for your salespeople

As one of our best heads of sales anywhere, Chief Revenue Sales Officer, [Colleen Honan](#), one of the best we know constantly focuses her sales managers and salespeople 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'.

[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 Tactics and Activities 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 it, developed within the architecture of a PowerPoint deck or integrated in detail with your sales process and the tools in your CRM.

First get your ideas down in any manner that you want. Think it 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 that 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 those planning details and tools 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 on the Sales and on the Marketing teams and in their respective tactical plans. That language is totally up to you, and the language definitions are whatever you say they are. Once they are established, enforce the use of those terms 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 certified profession*, and whether it's the profession of being a Navy Seal, a certified electrician, a member of the New England Patriots or the certified auto mechanic for your car, and most importantly the pilot or the surgeon that has your life in their hands, there are specific rules, processes, tools and measurements that then customized to your specific company and become *"the [your name of your company] way"*.

Why would you allow your salespeople to do anything differently? They will become "certified" to *"Your [your name of your company] 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 that it be used everywhere from the streets in the field to the directors in boardroom.

For what it's worth in our own vocabulary...

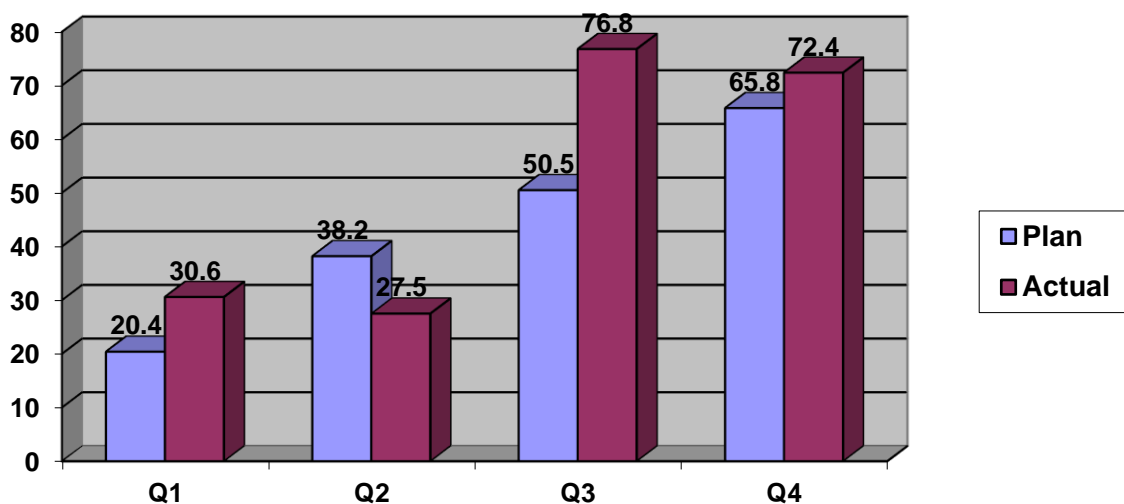
- We use **"Objectives"** rather than "goals".
- We use **"KPI's"** for Key Performance Indicators.
- We use **"Business Plans"** for officially approved Business Plans by the Board of Directors and **"Sales Plans"** for annual and quarterly sales plans submitted by the Chief Revenue Officer or VP Sales 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% and preferably 20% more than the Business Plan number. If you use the same performance numbers for both the Sales Plan and for the Business Plan, there simply is no "white space" for the normal corrections of the real world, and you will waste countless hours explaining rather than selling.

- **“Tactics”** are fundamental quarterly plans, and **“Activities”** are the action items.
- **“Customers” & “Prospects”**. We actually do understand the difference, but we tend to mix the terms in our talks since the ideas and the tactics apply to both. What we do use is the term...
- **“Personas”** define in human terms the real buyers, the real influencers, and the real decisions makers who are involved. This is an absolutely critical component to define Personas in your company’s marketing plan and then to use those terms in the execution of your sales plan
- **“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.
- **“Calls” and “Connects”** refers to calls, emails, Zoom/Team meetings and (at some time in the future) 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 personal preference. We are certified Hubspot Agency Partners and can provide a much more efficient and more effective process at a lower cost.
Just connect with me at jack@derbymanagement.com, and we can talk about this.

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

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 and quota metrics 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 need to be very detailed and in text; they are metric-heavy and graphically accurate three month written plans. There is nothing general or fluffy, and the “hope” word is not only never used, it’s never even thought about. 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. Yep, this is hard work, but in any sales environment and especially in a Covid World, this is a battlefield with tons of competitors including the guy- “Do Nothing!”-and your plans cannot be fluffy.

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 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 sales operating strategy of **“Streets not States”**. There is not much rationale that a \$10 million business, with a total of 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.
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- 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 product and only sold in three states in New England. Due to the tight geography our coverage was excellent of the eastern MA, Providence, RI and the NH territories 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 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

KPI Measurements Both sales metrics & KPI's	Q1	Q2	Q3	Q4	Total
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 extend it to “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 to have 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 Yrs
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 this 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 their own planning and for the personal impact with your own salespeople.

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"> • Increase call frequency to 8x/month • Send to National Speaker training program
	•	• • •
	•	• • •

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” which are lots of big ideas, lots of talk and lots of arm waving.

Regional Sales Plan Template

The 5 Steps to Creating a Winning Regional Sales Plan

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

Beginning of a Written Region Action Plan Template

Region Action Plan

Name of District/Region

Name of Sales Rep

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 Zoom/Teams 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 based on the use of these steps and the increasing use of using of the metrics for these steps.

Examples of Criteria used to define a Key Account:

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

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 and easily tied instantly 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.

Customer Segment	# of contacts to connect with at each KA	Target Connect Frequency	Total Targeted Connects/ Month	Actual Connects Month 1	Actual Connects Month 2	Actual Connects Month 3
"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			
Totals						

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

(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



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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



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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	Large 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 st 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-People & 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.



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

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 into a major rewrite scheduled January 2021.

Best of Success in your 2020 sales planning,



[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