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Sales Planning

OCTOBER 20TH, 2020

Sales Planning

Keys to Success

Look Back / 2020 Assessment

2021 Vision

Client Base Evaluation

Driving Success

Plan Format

Summary

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Keys to Success

Process vs. Event

Understanding Your Starting Position

Realistic Expectations

Client Intimacy

Right Team

Vision for the Period

Specific Action Plans

Diligent Follow Up

A Living Document

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Look Back / 2020 Assessment

What Worked Well?

Highlight Successes

What Does the Organization Need to do Differently?

- People
- Process
- Technology

What Adjustments Need to be Made?

Evaluate Reasons a Specific Goal Wasn't Achieved

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2021 Vision

Who / What Does the Organization Want to be in the Marketplace?

What Should the Organization Reasonably Expect to Achieve?

- Capabilities/Services
- Geographic Reach
- Client Mix (existing versus new)
- Client Demographics
- Investments

Stretch Plan

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Client Base Evaluation

Existing Clients

- How much of Total Plan?
- Growing / Declining?

New Clients

- Ideal Client Profile
 - Geography
 - Industry
 - Size
 - Spend
 - Buyer Values

Other Business Relationships

Value Prop

Vertical / Service Expansion Opportunities

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Driving Success

Management Plan

- Supervision – What
- Training – How (Common Sales Methodology)
- Coaching – Reinforce & Improve

Behavior Modeling

Follow Up

Make Adjustments

Update Action Plans

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Plan Format

Executive Summary

Background & Approach

Individual Territory Plans

- Client & Prospect Overviews
- Three Month Action Plan
- Financial Plans

Management Plan

Summary Financial Plan

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Takeaways?

Group Discussion