

Ensuring Strategy Generates Action

By Ron Snyder

How many times have you sat in a territory or account review and heard great strategies being proposed only to find out a month or two later that none of those strategies are actually implemented? We all know brilliant strategists who, because they do not implement their strategies, do not produce results.

How do you ensure that strategy will turn into appropriate action to produce the desired results?

1. **Create a process** by which plans and strategies are generated and reviewed. Without this, many sales people will try to “wing it” and get caught by surprise. Hold regular (monthly or quarterly) territory and/or account reviews. I have seen these to be very helpful; providing the incentive to reflect and create a thoughtful plan.
2. **Emphasize the importance** of doing good analysis to generate powerful strategies and then taking the action necessary to implement the strategy. The plan format must enable a logical flow from:
 - Trend analysis to
 - Goals to respond to the trend to
 - Strategies and tactics to
 - Action plan and resources required.
3. **Make it easy** to generate the plan. For example there must be an easy to use template that is readily accessible. Further, it should be in your CRM/sales force automation tool so that it is easy to review and update.
4. **Regularly review plans** and progress on a regular basis. This will ensure the appropriate follow up is occurring. Reviewing the action plan often identifies other actions that need to be taken additional resources necessary to move the action forward.
5. **Leverage the team.** I have seen account reviews in which the account manager was stuck. There was no obvious way to proceed. However, using the collective wisdom of everyone in the room, we came up with a great solution that enabled us to won an opportunity we would have lost.



Though it may be obvious that you must focus on both strategy and action, I have worked with many organizations and have found that most organizations typically favor one or the other. This is insufficient to win consistently in today's challenging selling environment. Focusing only on strategy is likely to create great ideas that bear no fruit. On the other hand, too much emphasis on action without thought just creates a lot of busyness and insufficient results.

Creating the environment in which strategy consistently translates to productive action is one of the key jobs of management. How is your organization doing?

Plan 2 Win Software

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Plan 2 Win Software was founded by sales veterans and former VP of Sales. We saw that Sales Force Automation Systems needed territory and key account planning tools.

Our sales planning software enables Salesforce.com (SFDC) users to create and manage territory and account plans right in their SFDC environment. They capture key trends in the industry, geography and vertical market. Sales execs, then, develop strategies, identify target accounts, business opportunities and partners to leverage and develop action plans to grow their business. These plans are perfect for Quarterly Business Reviews (QBRs) and strategic account reviews. This enables sales teams to fill their funnel with better prospects, make better use of their time and resources and produce better results!

Visit us at <http://www.Plan2WinSoftware.com> and on the AppExchange at: <http://bit.ly/hPTdDT> (territory planning) and <http://bit.ly/eCZcFR> (account planning).

For our complimentary white papers on Territory and Strategic Account Planning, go to <http://www.Plan2WinSoftware.com/free-white-paper/>.

For our new book, PLAN to WIN; Strategic Territory and Account Planning, go to <http://www.Plan2WinSoftware.com/resources/plan-to-win-book>.

