

Plan2Win

SALES PLANNING SIMPLIFIED

Getting the Best Results from Your Sales Territories



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Territory Management/Planning

- The Challenge
- Best Practices
 - Territory Management Process
 - Effective Territory Plans



Industry averages

- 53% of forecasted opportunities did not close
- 25% of Sales Organizations:
 - ❖ Win rate < 25%
 - ❖ 40% quota achievement



Source: CSO Insights, Sales Optimization Reports



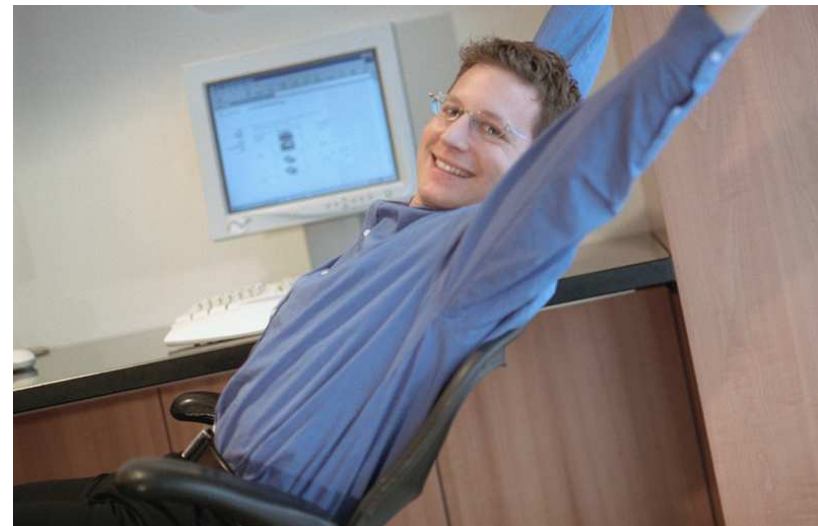
Top Sales Organizations have:

- Win rate >60%
- 65+% quota achievement

There is a better way!



Source: CSO Insights, Sales Optimization Reports

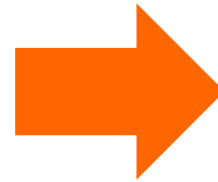


Reactive Mode

Vicious Cycle



Too many inputs
Hard to react to all
No proactive effort



Strategic Mode

Virtuous Cycle



Goal- based plan
Implement strategies
Monitor and adjust



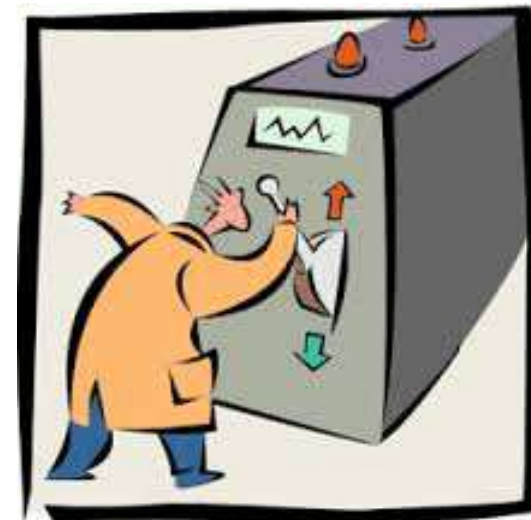
Sales Strategy and Planning...

Is the most important sales management lever

73% of Sales Leaders!

Sales Planning - Impact

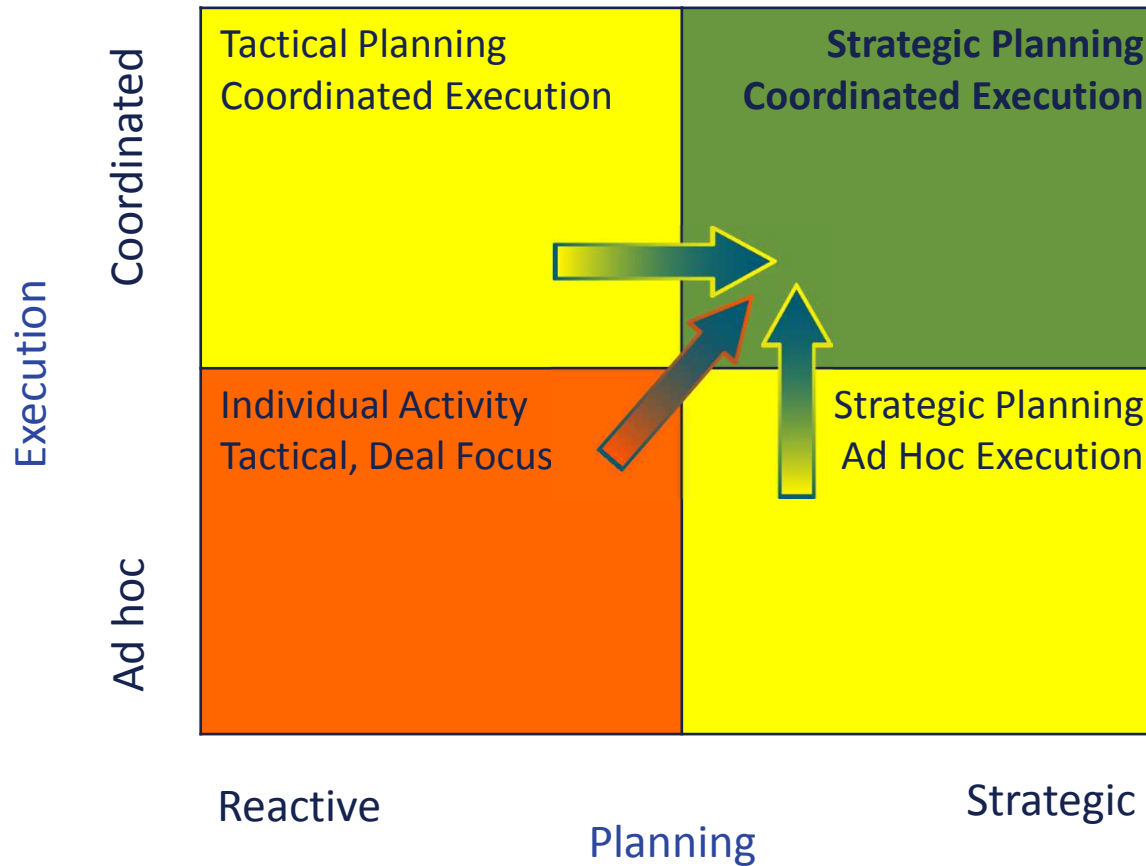
- Increases growth rates
- Improves customer retention
- Enhances cross sell and upsell



Source: Webinar: Sales Planning and Strategy: Optimizing Resources, Tactics, and Outcomes,
Mercer and Sales Management Association, March 2013



World Class Sales Organizations use Sales Planning



1. Territory Management Process

- Establish Process
 - Management Support
 - Implement



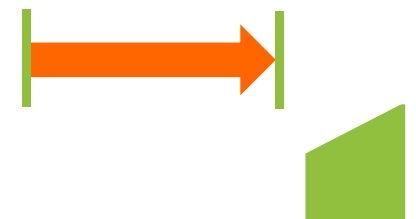
2. Effective Territory Plans



Territory Management Process

Do you have a Territory Management Process?

1. No
2. Some reps have a territory planning approach
3. Some Regions have a territory planning process
4. We have a common process used across the sales team



World Class Sales Organizations did 25% better in sales metrics by:

- ☑ Criteria for strategic accounts
- ☑ Selecting opportunities to pursue
- ☑ Allocating resources
- ☑ Advancing opportunities
- ☑ Leveraging best practices

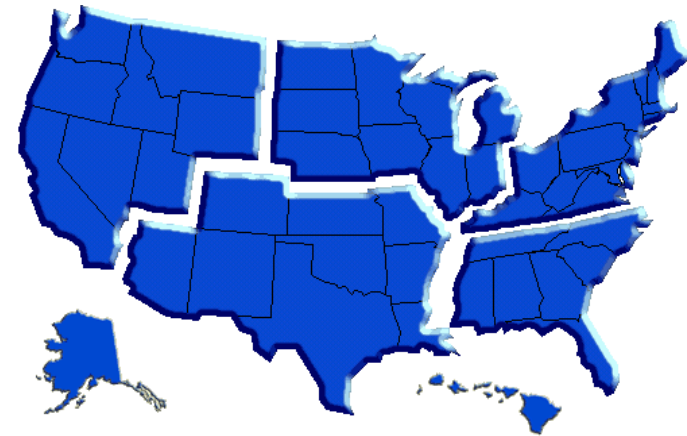


Source: 2013 Miller Heiman Sales Best Practices Study Executive Summary:
The Growing Gap Between Good and Great

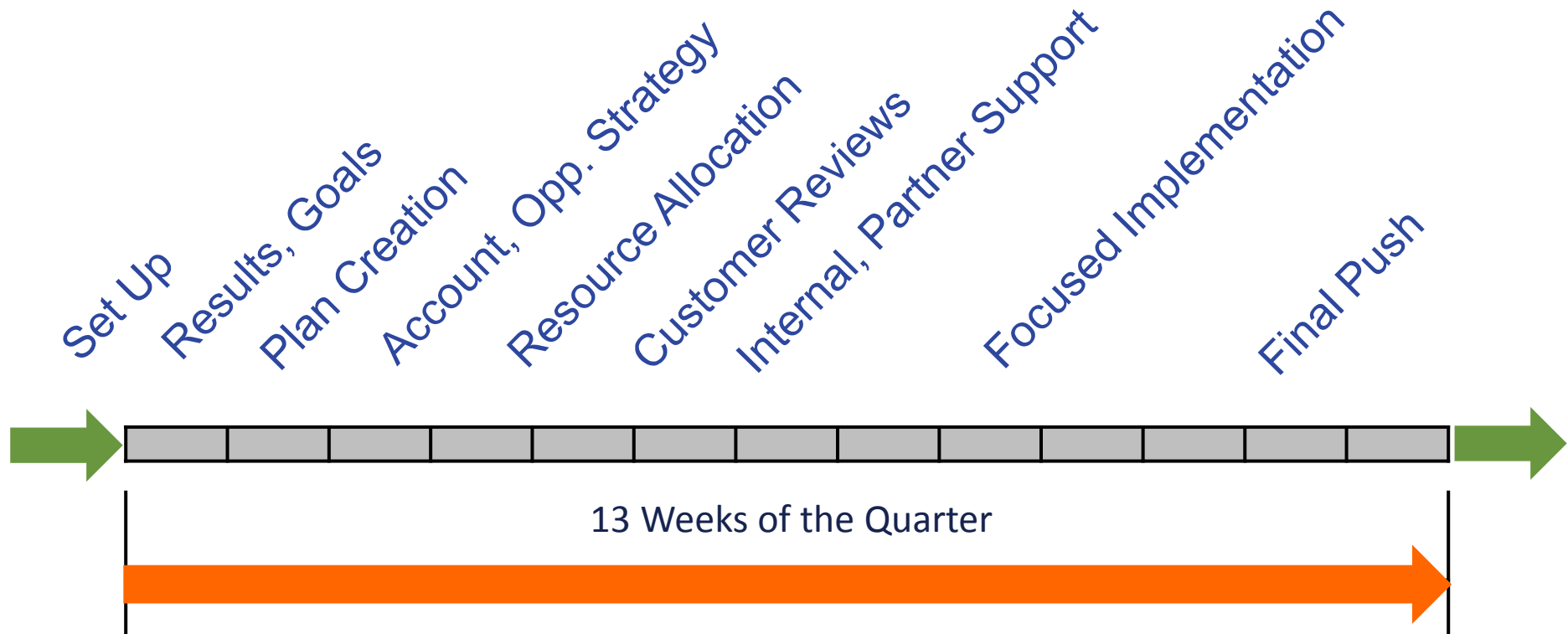


Set Up for Success!

- Review last Quarter's results
- Set Goals
- Review territory assignments
- New methods



Implement a Process



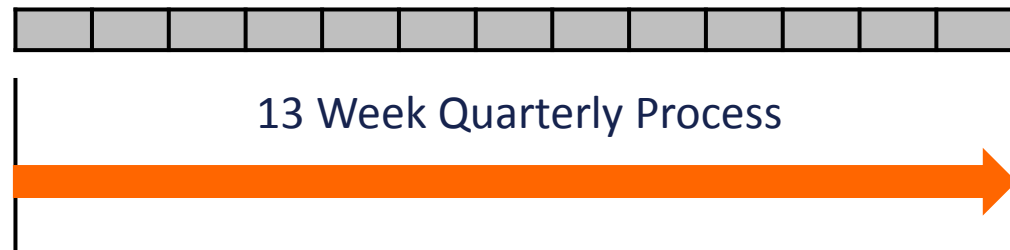
Customer Business Reviews

- Business goals
- Resolve issues
- Identify new opportunities
- Senior management



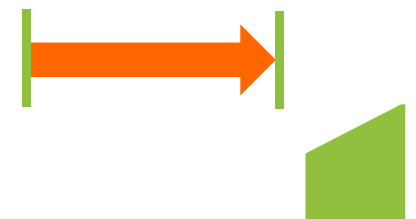
Implementing the Process

- Leadership Support
- Communicate Objectives
- Build it into the Calendar
- Manage to the Plan of Record
- Share Learning
- Celebrate Wins!



“Territory management should be 75% of what sales leaders concentrate on, because it includes the strategy and tactics that they need to execute to achieve their objectives. The rest is minutia.”

- Tim Henning
- VP of Sales for medical equipment companies



1. Territory Management Process



2. Effective Territory Plans

- SWOT, Strategies
 - Key Accounts, Opportunities
 - “Plan to Achieve Plan”



What kind of Territory Plan do you use?

1. Not using territory planning
2. Each rep uses their own territory planning template
3. Some Regions have a territory planning template
4. We have a template used across the whole sales team



Key Elements of Effective Territory Planning

1. Goals

Territory sales goal	\$1,000,000
Sum of closed opportunities	\$50,000
Additional sales from existing base	\$0
New sales needed	\$950,000.00
Pipeline needed	\$3,800,000
Sum of open opportunities	\$145,000
Pipeline gap	\$3,655,000

▼ Behavior and Territory Goals

Territory Goal #1	Double revenue from 2014 to 2015; 50% from new accounts and 50% from current accounts
Territory Goal #2	Double amount in funnel; 50% new accounts and 50% current accounts
Territory Goal #3	Increase penetration in tech sector by 25%
Territory Goal #4	Penetrate current accounts- into new business units

- Trend Analysis
- Strategies
- Accounts
- Opportunities
- Relationships



Key Elements of Effective Territory Planning

2. Territory Analysis

Strength, Weakness, Opportunity, Threat			New SWOT
Action	Type	SWOT Description	
Edit Del	Strength	Superior technology	
Edit Del	Weakness	Limited market awareness	
Edit Del	Opportunity	Take advantage of growing use of web meetings	
Edit Del	Threat	Larger competitors have better market presence & large installed bases	
Edit Del	Threat	New low-priced competition	

- Trend Analysis
- Strategies
- Accounts
- Opportunities
- Relationships

Key Elements of Effective Territory Planning

3. Strategies, Tactics

Strategies		New Strategy
Action	Strategy	Tactic
Edit Del	Leverage contacts to ID new prospects	Contact key contacts to ID new prospect candidates
Edit Del	Marketing campaign to find new prospects	Set up campaign plan. Focus on tech companies.
Edit Del	Penetrate new BU's in current accounts	Identify 1-3 candidate BU's in each major account

- Trend Analysis
- Strategies
- Accounts
- Opportunities
- Relationships



Key Elements of Effective Territory Planning

1. Goals
2. Territory analysis
3. Territory Strategies, Tactics
4. Prioritize accounts and opportunities



Key Elements of Effective Territory Planning

5. Account/Opportunity Strategies

Account Strategy	
Priority	A
Account's compelling needs	Need to improve sales effectiveness
Account's strategic initiatives	Bring in sales planning tools in SFDC
Our product/ service	Account and Territory Planning apps in SFDC
Our differentiators	Sales Planning capability Easy to use and learn Cost effective
Our sales approach	Contact key decision makers and discuss needs and our solution

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- Trend Analysis
- Strategies
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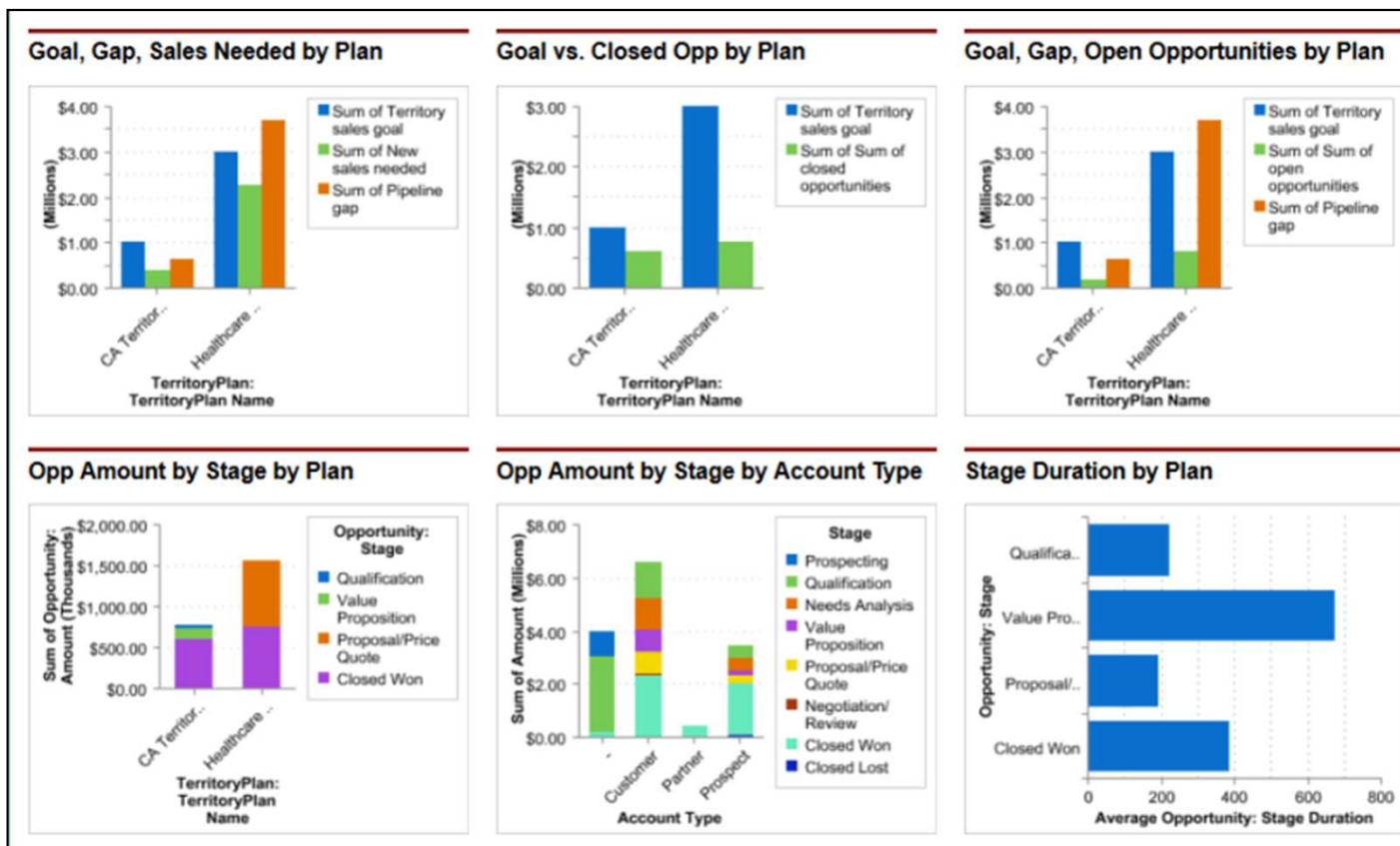
Key Elements of Effective Territory Planning

1. Goals
2. Territory analysis
3. Territory Strategies, Tactics
4. Prioritize accounts and opportunities
5. Account/Opportunity Strategies
6. Partners
7. Action Plans
8. Reports & Dashboards



Key Elements of Effective Territory Planning

8. Reports & Dashboards



Actions guided by Strategic Objectives

- Clear Goals and Assignments
- High pay-off Accounts, Opportunities
- Good Strategies, Plans
- Manage to the Plan



*“These apps transform Salesforce from a data repository
into a strategic selling tool.”*

- Joan Washburn, CEO, sales consultant,
former VP of Sales for medical equipment companies



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Partial Customer List



Adobe



invent



Phillips

SIEMENS



Mentor Graphics



NETSUITE
ONE SYSTEM. NO LIMITS.



covisint



ZONARE



Agilent Technologies



ALLIANCE IMAGING
A Division of Alliance HealthCare Services

SYNOPSYS



VERIGY
the brilliance of innovation



z e u s

AVAYA



ZeOmega



The Institutes



TigerTel

ANDRITZ



corpedia
ETHICS. ELEVATED.



INDUSTRIAL DEFENDER



FORSYTHE



GLOBALCAPACITY



Ntirety
THE DENRISK ADMINISTRATION EXPERTS

eLynx



Star
engage.connect.convert.



Blackbay
Empowering Mobile Workers



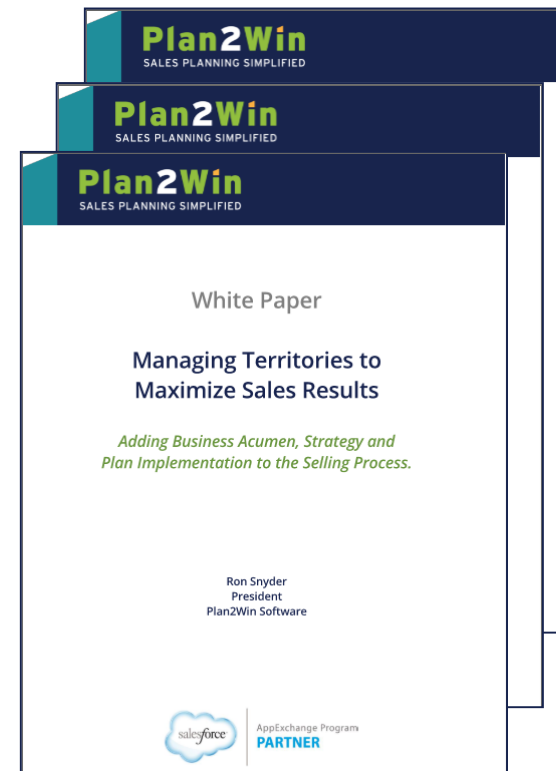
KeneXa
Formerly known as OUTSTART



DATA TRAK
INTERNATIONAL
From Concept to Cure

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Questions?

How to Get the Best Results from Sales Territories



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On Salesforce.com AppExchange:

Territory Plan Pro



AppExchange Program

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