

Territory Plan: CA Territory Plan

Generated:07-11-2014

Corporate Plan/Quota

Average opportunity size	\$100,000	Territory sales goal	\$1,000,000
Close ratio	50%	Sum of closed opportunities	\$600,000
Number of new wins needed	4	Additional sales from existing base	\$0
		New sales needed	\$400,000.00
		Pipeline needed	\$800,000
		Sum of open opportunities	\$30,000
		Pipeline gap	\$770,000

Territory Overview

Industry trends impacting your territory

Challenges in meeting sales goals

Key trends in your geography

Economy still sluggish- except tech sector

Behavior and Territory Goals

Territory Goal #1

Increase sales to tech sector

Territory Goal #2

Build funnel by 30%

Territory Goal #3

Leverage current customer successes

Territory Goal #4

Build partner network

Narrative

Territory narrative

Leverage current successes and build partner network

Additional issue / info to consider

How to build partner network

SWOT

Strengths

New product provides unique capabilities

Opportunities

Need for our new product in Tech Sector

Weaknesses

Need to build visibility in market place

Threats

Entrenched competition

Strategies

Strategy Build funnel

Tactic Generate email campaign

Strategy Create Tech Sector focus program

Tactic Generate Tech Sector plan

Strategy Sell new product

Tactic ID candidates for the new product

Target Accounts

Account General Motors

Priority A

Type Customer

Account's compelling needs

Need better territory management

Account's strategic initiatives

15% sales increase via effective territory management

Our product/ service

Territory Planning app

Our differentiators

Improves visibility across territories Enables effective territory plan implementation

Our sales approach

Leverage success elsewhere in the industry and partner contacts

Partner Chrysler

Partner relationship Strategic Alliance (Local)

Partner strategy

Leverage success to win in GM

Account American Airlines

Priority B

Type Prospect

Account's compelling needs

Need to increase sales to existing accounts

Account's strategic initiatives

Increase sales to top accounts by 20%

Our product/ service

Account Planning app

Our differentiators

Provides greater insight Ensures successful plan implementation Leverages market insights

Our sales approach

Leverage current contacts to meet with decision makers

Partner Avaya

Partner relationship Strategic Alliance (Local)

Partner strategy

Leverage each others' contacts to support each others' efforts

Account Global Media

Priority A

Type Prospect

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

Partner IBM Local

Partner relationship Strategic Alliance (Local)

Partner strategy

Have Linda Hunt introduce us to VP of Sales

Target Opportunities

Opportunity GM: Territory Plan Pro

Account	General Motors
Amount	600000.0
Stage	Closed Won
Type	Existing Business
Close date	Sep 16 2012

Account's compelling needs/ events

Need to improve sales planning effectiveness

Our product / service

Territory Plan Pro

Account's decision criteria

Need Territory Planning app that works in SFDC

Our differentiators

Create plan easily, quickly Track strategies to action Manage plan implementation

Account's decision process

Review top 3 candidates Submit recommendation to VP Sales VP Sales decides

Account's funding/ budget process

Sales Manager submits to VP Sales VP Sales reviews with CFO for approval

Next steps

Meet with Sales Manager re solution to needs Meet with VP Sales and Sales Manager to get support Provide support in approval process

Opportunity American Airlines: Account Plan Pro

Account	American Airlines
Amount	20000.0
Stage	Qualification
Type	New Business
Close date	Sep 30 2013

Account's compelling needs/ events

Our product / service

Account's decision criteria

Our differentiators

Account's decision process

Account's funding/ budget process

Next steps

Opportunity Global Media: Sales Planning apps

Account	Global Media
Amount	10000.0
Stage	Qualification
Type	New Business
Close date	Apr 30 2014

Account's compelling needs/ events

Need to improve sales effectiveness to increase sales results by 20%

Our product / service

Account Plan Pro Territory Plan Pro

Account's decision criteria

Apps in SFDC Help sales team do better sales planning

Our differentiators

Sales Planning in SFDC Easy to use and learn Cost effective

Account's decision process

Search for sales planning apps Review apps Team decides

Account's funding/ budget process

VP Sales submits to President President approves

Next steps

Contact key decision makers and discuss needs and our solution

Partners

Account IBM Local

Contact

Linda Hunt

Partner relationship

Strategic Alliance (Local)

Our Value to them

We provide products IBM customers need

Their Value to us

IBM has great contacts

Partner strategy

Leverage IBM contacts to sell into their accounts

Tasks

Name**Subject**

Sell new product: ID candidates

Priority

Normal

Status

Not Started

Due Date

07-14-2014 00:00:00

Comments

Strategy:sell new product Tactic:ID candidates for the new product

Name**Subject**

Generate email campaign: Build funnel

Priority

Normal

Status

Not Started

Due Date

07-18-2014 00:00:00

Comments

Strategy:Build funnel Tactic:Generate email campaign

Name**Subject**

Generate Tech Sector plan

Priority

Normal

Status Not Started
Due Date 07-28-2014 00:00:00
Comments
Strategy:Create Tech Sector focus program Tactic:Generate Tech Sector plan

Events

Name Linda Hunt
Subject Meet with Linda Hunt re collaboration
Location
Start Date 04-29-2014 18:30:00
End Date 04-29-2014 19:30:00
Description
Strategy:Leverage Partners Tactic:Meet with Linda Hunt re collaboration

Name Eric Botcha
Subject Build funnel: ID new opportunities
Location
Start Date 07-11-2014 20:00:00
End Date 07-11-2014 21:00:00
Description