Sales Plan

**Confidentiality Agreement**

The undersigned reader acknowledges that the information provided by \_\_\_ in this Sales Plan is confidential; therefore, reader agrees not to disclose it without the express written permission of \_\_\_. It is further acknowledged by reader that information furnished in this sales plan is strategic in nature- meaning that any disclosure or use of it by reader may cause serious harm or damage to \_\_\_\_\_ . Upon request, this document is to be immediately returned to \_\_\_\_ .

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name (typed or printed)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date

**Introduction to our Sales Plan**

Our Sales Plan/Strategy is precise and proprietary in nature; in other words, my support team and I will be the only people executing it. The roadmap it provides is strategically sound and is designed to create positive outcomes (Sales Productivity)- as well as provide exceptionally realistic financial rewards through its execution. The vehicle (the product/service), and the value it provides (improving lives, improving performance, increasing efficiency, and reducing risk, changing lives, delivering value, etc.) is something I can easily ‘get behind’ and sell!

My education in \_\_\_\_, excellent verbal skills (with full command of the industry specific language involved), and extensive experience in the \_\_\_ environment at one of the highest performing \_\_\_\_\_ in the country provides us a strategic advantage we can fully exploit for consistent, positive results. The strategy/sales plan is highly organized and designed specifically around my strengths and style of delivery. It involves precision execution in these seven key areas in order to build and maintain a high performance ‘sales funnel’ producing consistent high-end results. In order to execute, the process requires meticulous attention to detail and intense focus on development, conversion, and fulfillment opportunities on a daily basis- this I am fully prepared to do.

1. Strategic Outreach
2. Relationship building and creating trust with decision makers
3. Fact-finding, needs analysis, information gathering
4. Providing solution presentations
5. Successfully handling resistance, overcoming areas of concern
6. Achieving consensus, commitment, and closing sales
7. Consistent, persistent, multi-dimensional follow up engagements

**My Strategic Outreach Strategy**

Key to the successful execution of my Sales Plan is consistent and persistent outreach- *keeping the pipeline full*. Although the market for my product is technically savvy, it still relies more *often than not* in ‘old school methodologies’ for developing potential clients: prospecting through telephonic outreach, teleconferencing, desktop sharing, and face to face appointments. Realizing success is a numbers game and requires working the law of large numbers; I utilize technology to maximize efficiency in my prospecting and sales efforts- time is money! There are thousands of potential prospects in my service area alone, and millions nationwide! Each one has multiple decision makers that have to be qualified and vetted- and ‘knocking on doors’ in the attempt to speak to them would be time consuming, ineffective, and a waste of my time and efforts.

My access to pre-qualified leads is extensive. I will use the phone, teleconferences, and desktop sharing 80% of the time to make my introductions, build relationships, qualify decision makers, and schedule firm presentation appointments (Virtual or Face to Face). My plan involves systematic ‘building of value’ and ‘elevating the commitment’- and due to the fact that there are many layers of bureaucracy to navigate and typically 3 to 4 gatekeepers to get past; relationships and trust must be established through multiple contacts if necessary in order to share my solutions with the right people.

The activity level on outreach must be consistently high (80 to 100 attempts) daily in order to have enough progressions to generate 2 to 3 appointments with new prospective clients every day. This way, when one out of three cancels, and another reschedules- there is still one solid solution presentation that stays on the books daily. Where 1 out of 2 presentations yields a Long Term Client, this consistent activity level will create 2 to 3 Long Term Clients per week within 2-3 months and grow from there with improvement! One way I will compress time frames and accelerate my success, is by stacking my schedule and double booking appointment times. In this way, I can control my schedule and meet with the most qualified leads first, and reschedule the least qualified others (to continue development and conversion). This has the effect that ‘everybody else is moving forward, maybe we should too!’

Having an extensive database to work eliminates the seemingly too frequent, too aggressive prospecting attempts that a short list tends to create. Prospecting needs to be engaging, totally professional, and about solving problems- not about creating high-pressure sales situations. My Sales Plan is consistent, methodical, and keeps the prospective client engaged and moving forward towards improving performance, increasing efficiency, reducing risk, saving more lives!

**My Strategy for Relationship Building and Creating Trust**

My Sales Plan is all about building relationships and creating trust. From the initial contact and throughout the prospective client’s chain of command, I believe developing relationships built on honesty, sincerity, respect, and trustworthiness. I take a genuine interest in people’s lives and make it a point to document with accuracy, anything and everything ‘of interest’ to the people I talk with. This way, I can review the communication logs prior to every future contact and ‘reconnect’ with them first- before moving on to business. I have found that people, generally, have to know you care and that you are an ally, a friend- before they will confide in you or do something for you. As it’s written somewhere- you have to ‘give’ before you have the ‘right to receive’. I believe in investing (energy) in people up front, giving them the benefit of doubt; and by doing, so people are much more likely to confide and provide assistance in return.

The common ground I look for in everyone I meet by phone or in person is the desire for a ‘better life, saving lives, and living longer, happier lives, efficiency, quality etc..,’. Since most of us in the field of ------ want all of the above, this is a great place to start. When I bring up “how did the daughter do in her cheer competition last month” before anything else, the prospective client knows I was paying attention and appreciates me ‘taking an interest’. People’s personal lives make the perfect bridge to get to my value proposition, *the transition*- it’s what makes me good at what I do! It’s a lot more difficult to get what you want and need if you are not willing to give people what they want and need. I know that may sound cliché, but its true!

**The Fact-Finding, Needs Analysis, Information Gathering Strategy**

Prior to presenting the life changing value, opportunity, and benefits our solution has to offer its critical to know more about what they are using now, what they like about it, what they don’t like, and what they would like to alter or improve in considering change. The answers to these questions reveal a lot about the prospective client’s previous decisions, the frequency of changes they made, their hot buttons, and what they are truly looking for in making another change. It helps in structuring the solution presentation so it comes across customized, just for them. However, one of the worst things you can do is give the solution presentation to the wrong decision maker (this could render it impossible to get back in front of the right people because the wrong person may have already given them a less than thorough version or translation of the presentation already). Therefore, the last part in gathering the right information is finding out “who, other than themselves, will be involved in the decision and getting all decision makers there.” Presenting to the right decision makers is key to success in my Plan.

**Our Solution Presentation**

Delivering a ‘bulletproof’ solution presentation that’s customized to their specific needs, and delivering the ‘value added extras’ they are looking for- and at the same time providing what we’ve learned about their organization to help them rationalize the decision is what delivering our product is all about. By leading and guiding with questions, we are helping them accomplish common goals of higher performance, reduced risk, better efficiency, and ultimately impact the bottom line. Our hours of relationship building, fact-finding, and information gathering pay off here- if they do not make the decision to go ahead, it is probably due to our shortcutting the previous three step in the process. I am not a shortcut taker and I believe in being thorough; ‘proper prior preparation prevents poor performance’. If we are delivering our solution presentation, it is because we have done our homework, there is a need, we have the right decision makers present, and we have a high probability of closing the sale (30-50%).

**Successfully Handling Resistance, Overcoming Areas of Concern**

Handling commitment resistance and overcoming areas of concern is a skill and takes patience. From experience I have learned never to interrupt people when they are talking, especially when we are this close to committing a client, saving businesses, increasing efficient performance, and reducing risk at the same time. I use a six-step technique to handling resistance:

1. I hear them out, by listening and not interrupting- nobody likes being interrupted
2. I feed it back to them the way I heard it- so I understand what they are saying
3. I question the importance and isolate (in addition to this, is there anything else?)
4. I answer the concern (with their hot buttons, and using techniques I’ve learned)
5. I confirm I’ve answered it
6. Then I close again and move forward with the paperwork.

**Achieving Consensus, Gaining Commitment, and Closing the Sale**

Although consensus building is an ongoing process in my Sales Plan, whereby minor commitments and agreements are achieved throughout the outreach, relationship building, fact-finding, and presentation process- gaining commitment and closing the sale generally happens when the decision has been made to move forward and ‘buy in’ has been achieved. Most sales people are reluctant to ask for the order, not me. I ask for the business early and often, especially when the decision makers are qualified and the need for my product is clear. Using minor agreements, delivery dates, training and implementation, and a myriad of subtle closing techniques, I move the client towards owning my product without pushing but rather leading them to it. My most direct attempt is simply, “Ms. Jones analyzing everything we’ve discussed at this point I honestly feel the commitment makes good sense, and with your approval at this point- we can go ahead and schedule your program… by the way… is the end of next week too far out or do we need to move this up to Friday?’

One thing I have learned about selling is that it generally takes more than one attempt at closing the transaction to get a satisfied new client. I make every attempt to have more reasons why they should go forward than they have excuses for not doing so. I practice, drill, and rehearse my closing presentations and have learned the hard way; you do not get what you want unless you ask!

**Consistent, Persistent, Multi-dimensional Follow Up**

My Sales Plan uses a bucket strategy for every record (potential client), cold, warm, hot, and client! Every contact (not referred or warmly introduced) goes into the cold bucket until my value proposition has been made to a decision maker, and they have agreed they identify with the underlying value (the desire for increased performance, saving more lives, reducing risk). The ‘cold bucket’ records get attention once a month at least or ‘less frequently’ so as not to burn up the lead with contact attempts. Once they have agreed with our value proposition, they progress to the warm bucket- where we elevate the subject matter delivered (video conference, fact sheets, testimonials, etc), and the follow up intensity increases. Progression to the hot bucket comes when they have expressed the need for assistance with evaluating how we can help them help their patients, and they schedule for a solution presentation or demo to help them gather all the necessary information they need to make a final decision.

By ‘multi-dimensional’, I mean, not wearing out one method of contact repeatedly with too much frequency you lose the client. Technology (automation: social media, email, text messages, calls, etc.) enables us to reach out through multiple mediums with multiple messages and stagger them out so we come across only as genuine, super professional, and diligent in wanting to help solve their problems.

The client bucket receives a different kind of follow up- follow up after the sale. Our objective is superior customer service and of course, to reel in potential referrals as well. We track important events they have shared: anniversaries, family life events, etc. so we can time our re-contact opportunities around things important to them- keeping it real!

**CONCLUSIONS**

My Sales Plan is a uniquely designed strategy for creating, developing, converting, and

fulfilling delivery (sales). It is a proven system for generating happy and satisfied clients is time tested and it works! My ratios and numbers are based on the half, half, half principle: half of the decision makers I pitch will be interested (or more), half of those will temporarily ‘bail out’. Of the half that commit and sit for the presentation, half (or more) will commit to ongoing counseling or training- and the other half will ‘wait’. Of the half that commit, some will change their minds last minute and the others will take delivery or commit. In other words- 20 contacts (in the right market) with decision makers will create at least 10 solid leads, 10 solid leads will create 5 who agree to a solution presentation (the other 5 go in the warm bucket for follow up). Of the 5 who scheduled, 2.5 will actually ‘sit’ and complete a presentation. Out of 2.5 appointment ‘sits’, 1.75 will commit, and half will pull out (going back in the hot bucket). Ultimately, 2.5 solution presentations a day will lead to 2 to 4 client sessions a week (bread and butter) and fill the warm and hot buckets with a compounding opportunity of future client enrollments.

I know my numbers and am committed to flawless execution and continuous improvement; I look forward to seeing you at the top!