

Sales Plans

How to Prepare Them and How to Profit From Them

Presented by Clifton Warren

The presenter

Clifton Warren

Principal

clifton@corporateeye.com.au

www.corporateeye.com.au



Today's Objectives

6 Step framework for developing effective sales plans

How to convert sales plans into measurable goals

5 Key metrics to monitor performance

How to convert your plans into superior performance results

*"I've discovered that the failure of strategies
is most often not the result of poorly
conceived strategies but rather the result of
poor implementation"*

Alan Weiss

Building Effective Sales Plans

6 Key Ingredients For an Effective Sales Plan

6 Planning questions

1. What is our mission?
2. What is our vision?
3. What is our desired future profile?
4. What is our position?
5. What is our competitive advantage?
6. What are our priorities?

A Mission Explains Why Your Business is unique

Our mission

“We are an insurance firm offering a broad range of risk management solutions and products to clients in the building, construction and trades industry.”

A Vision States What Your Business Must Become

Our vision

“Our primary drive is seeking new clients from our current solutions and products in our current targeted industries.”

Desired Future Profile States Who Will You Accept

Our Desired Future Profile

We seek new clients who have needs within the scope of our solutions and products and the following characteristics:

- Clones of our best clients
- They are within our targeted markets

We will not accept new clients that:

- Fall beyond our scope
- Provide us with undue risk and vulnerability

Positioning Outline How You Want to Be Known

Positioning

“We want to be known as a firm that provides practical solutions to the current insurance and risk management problems faced by business owners

Competitive Advantage Differentiates You From Competitors

Competitive Advantage in the Market

“Our competitive advantage is and will be our willingness and ability to convert concepts into practical actions and tools and to convey our capabilities in exciting ways.”

There Are Four Different Strategies for Achieving Growth

Growth Strategy Mix

Penetration	50%
Innovation	10%
Expansion	20%
Retention	20%

Converting Plans Into Measurable Goals

"What are my goals? What should they be?"

Peter Drucker

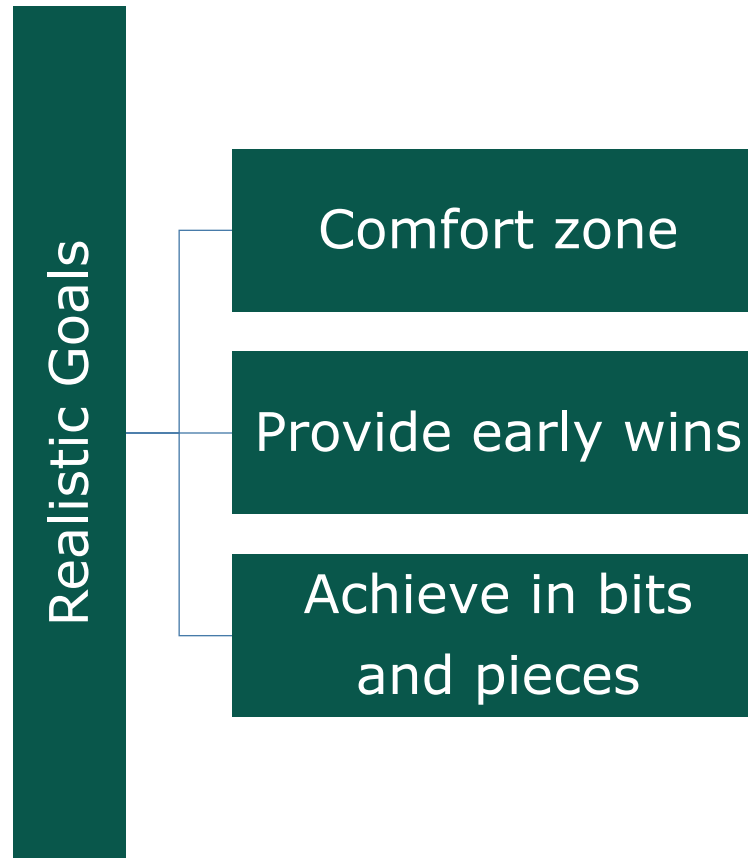
Objectives Are Action Commitments That Provide Direction



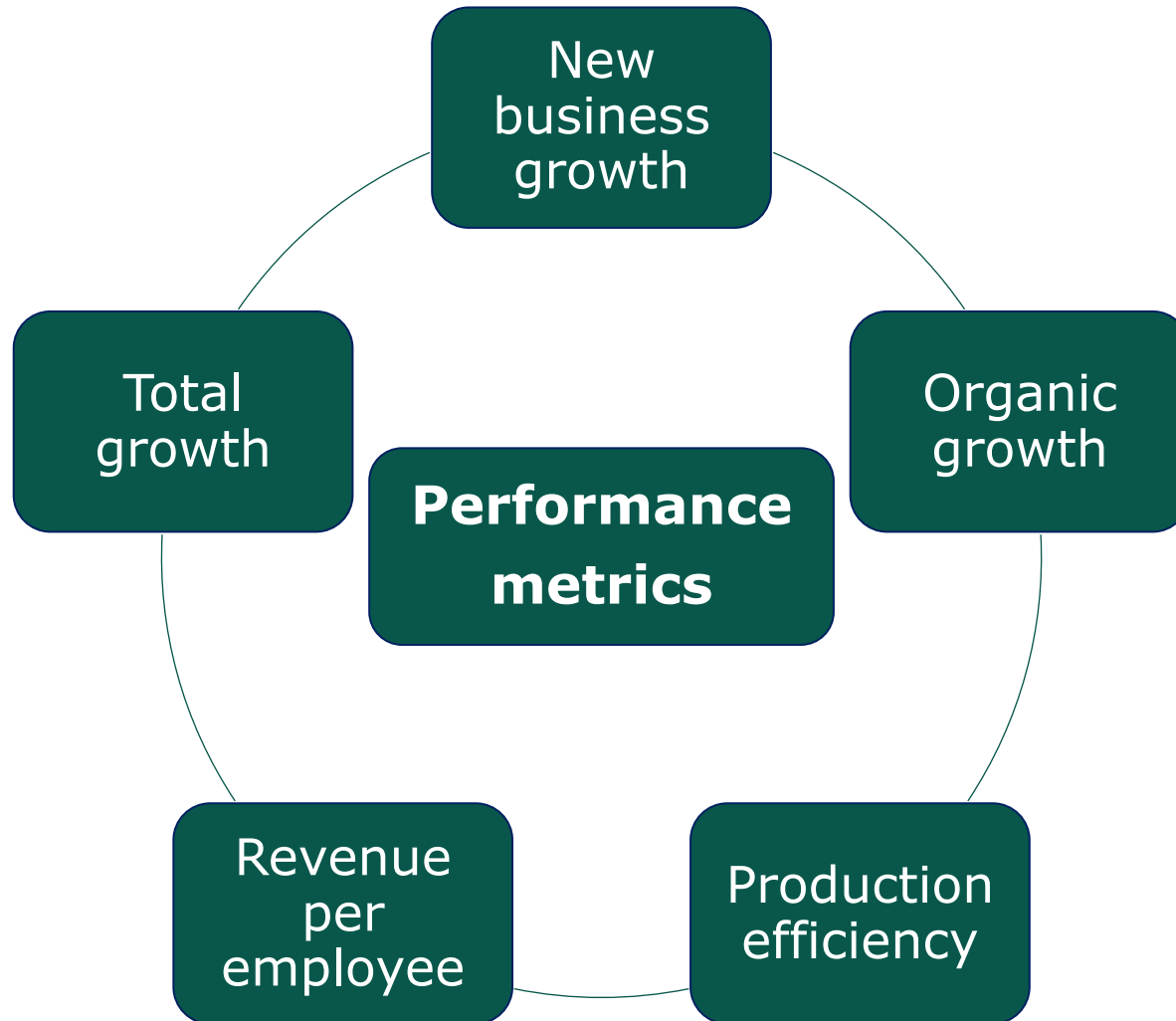
Objectives Are Action Commitments That Provide Direction



Establish Realistic Achievable and Result Based Goals



Regularly Monitor Performance to Keep Plans on Track



Executing Plans Into Superior Growth Results

*"Top performers do an outstanding job
of holding people accountable"*

Best Practices Sales Study

7 Best Practices to Build a Culture of Accountability

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- 1 Sales leadership ownership
 - 2 Sales plans for individuals
 - 3 Measure what you want managed
 - 4 Manage what you measure
 - 5 Provide help where needed
 - 6 Have courage to act
 - 7 Get everyone going in the same direction

5 Techniques To Convert Your Plans Into Results



How Corporate Eye Can Help

Free Sales Plan Execution Review

We will help you:

- Identify what objectives should be your focus
- Compare your capabilities with the best practices
- Develop a prioritize action execution list

Respond to our follow up email or call us at 03 9079-6392

Thank you!

Clifton Warren

clifton@corporateeye.com.au

www.corporateeye.com.au

+61 410 665569



www.corporateeye.com.au/blog



Ctwarren1



in/cliftonwarren

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