



## Territory and Account Plans Accelerate Results

By Ron Snyder

**Are there deals that you don't even get to participate in- or come in at the last minute?**

**Do you win all the deals that you should- based on the capabilities of your offering?**

**Do your sales people build territory or account plans that are really used to guide their actions and win business they would have lost?**

Instead of *planning* being a quarterly event that is *forgotten*, it is possible to build a plan that is available and top of mind daily. For example, it can be a tab in your sales force automation (SFA) tool (i.e. Salesforce.com, SFDC).

Without a clear plan, it is easy to fall into a very opportunistic or reactive mode- causing you to lose business you could have won. How many opportunities have you lost to poor planning or being outsold?

There are Territory and Account Planning software packages that walk people through the process of generating insightful, actionable plans to win more business. They enable you to plan a sales campaign that can increase deal size, average deal size, and new customer acquisition.

### Territory Planning

Are your people covering their territory as efficiently as possible? If they have a large territory, are they identifying the hottest area and creating and implementing a plan to penetrate those areas? Are they leveraging their travel time and using their travel plans to generate meetings they might not have been able to otherwise?

These tools can help you:

- Identify the key influencers in the geography or vertical market.
- Be "in the know;" in touch with the key players.
- Know what deals are coming together in the territory and even put them together.
- Generate and implement a solid plan to identify and win opportunities.

### Account Planning

Do you know all the opportunities that are going down in each target account? Do you create and successfully implement account strategies? Do you make full use of the Sales 2.0 technologies you have already bought?

Do you have a:



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- Standardized territory and account planning process and tool?
- Strategy based on the geography, vertical and/or target account?
- Way to review plans using workflows within your SFA tool?

Naturally, these tools can be used to manage success with partners as well as with direct accounts.

In my experience, good planning and execution makes a huge difference in results. Could this be the key to ensuring that your team wins more than its fair share of the business out there?

For examples of territory and account planning tools, visit Salesforce.com Appexchange or go to <http://www.territoryplan.com/>. These tools reside in SFDC as a main tab and play within the SFDC environment- using your accounts, contacts, opportunities and can generate tasks, events, opportunities, etc. Further, you can use the SFDC reporting to report on items within the territory and account plans generated.

Please feel free to contact me to discuss this further... or reply to this email and I will be happy to send you a **complementary white paper** re Territory Planning or Account Planning.

Good Selling!

Ron Snyder

## **About Breakthrough, Inc.**

**We provide Sales & Marketing guidance to companies delivering high value products and services- Business to Business.**

- ✓ Direct Experience- in Sales, Marketing and management
- ✓ Best Methods- an aggregate of best practices and tools
- ✓ Performance Management- to support successful adoption of new methods and tools; track progress and fine-tune approach

**Ron Snyder/ President**

