



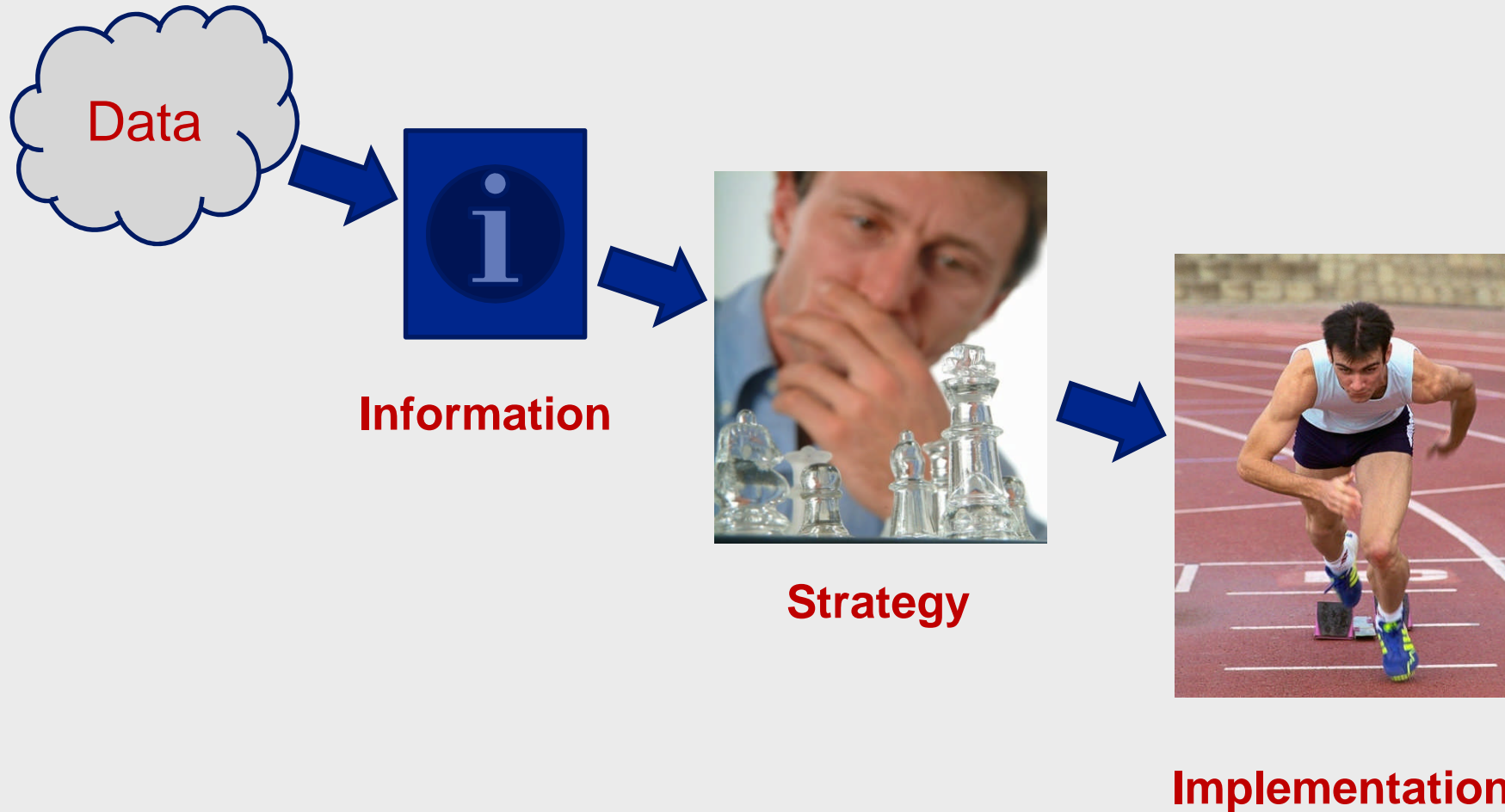
For the VP of Sales Forum



- Successful Territory and Account Planning
- Value of integrating sales planning into CRM
- Generating Adoption of Methods/Tools



# Convert Raw Data into Meaningful ACTION!



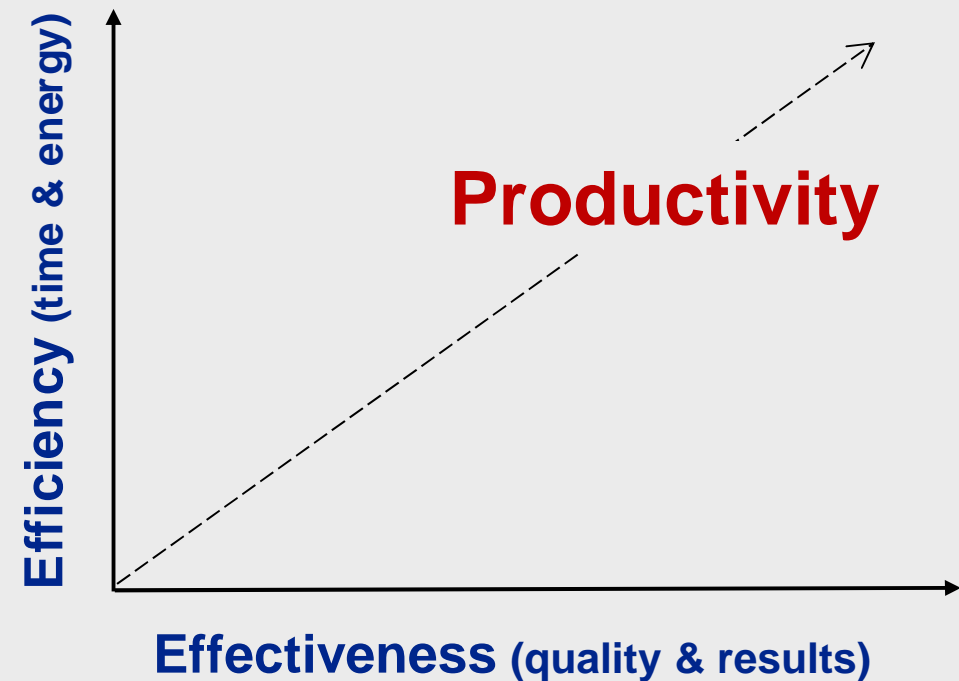
- Do it ASAP!!
- Engage Buyers
- Align Buying/ Selling/ Marketing
- Communicate across Boundaries
- Enable Users

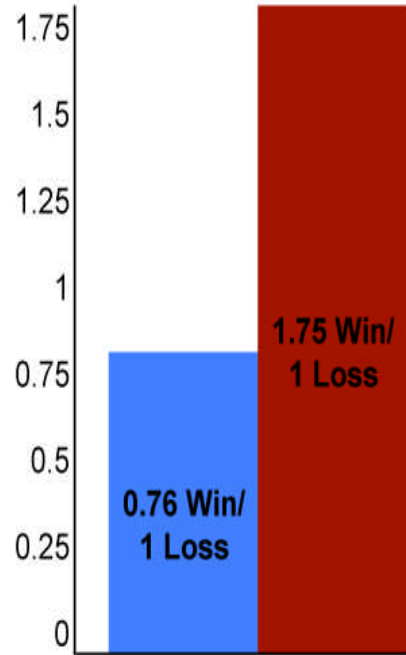


- S** **Speed;** everything is happening faster.
- O** **Open;** company environment must be open or new tools will blow you open.
- C** **Collaboration;** the revolution enables people, teams, companies and societies to take on new challenges.
- I** **Individuals** can start something farther, faster, deeper and cheaper than ever before.
- A** **Alignment;** “never been a more important time to sail your ships in the same direction.”
- L** **Leadership;** Must be a mix of bottom-up and top-down. Inspire, enable and empower everything.

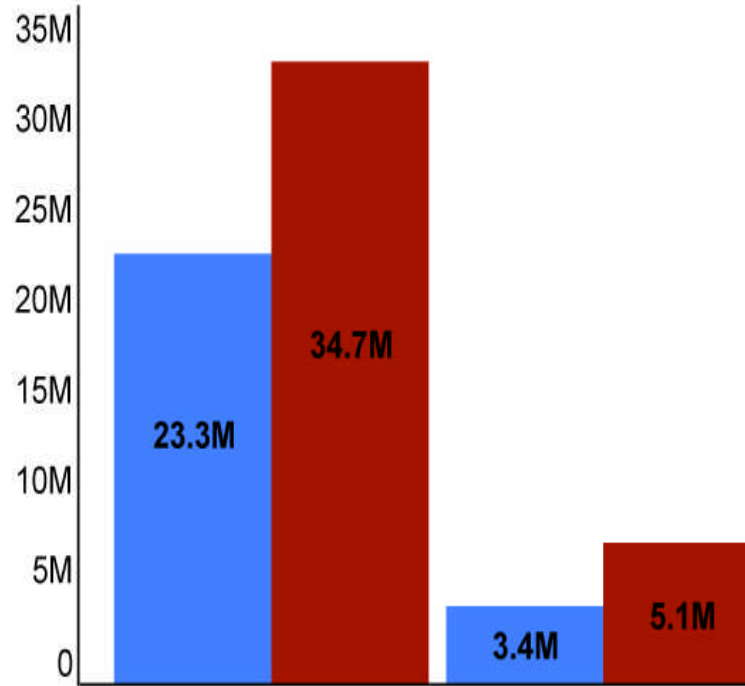
According to Marc Benioff/ Salesforce.com CEO  
As reported by Thomas Friedman,  
Mercury News, Oct. 25, 2011  
*“Silicon Valley once again leading tech revolution”*

- ▶ Better account, opportunity selection
- ▶ Improved strategies
- ▶ Plan is more visible
- ▶ Better use of partners
- ▶ Team participation
- ▶ Stay on top of changes



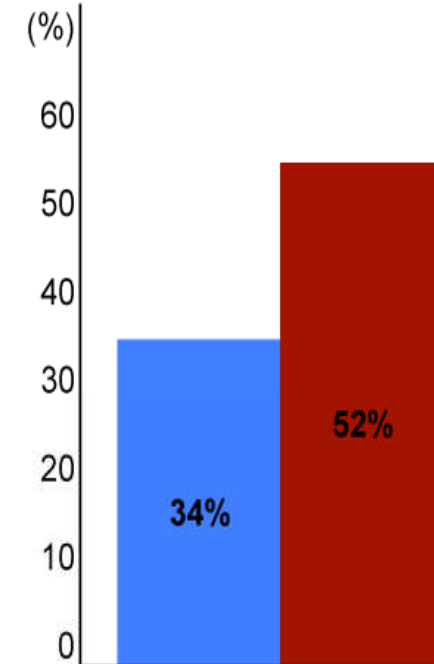


★ Win/Loss Ratio  
131% Improvement



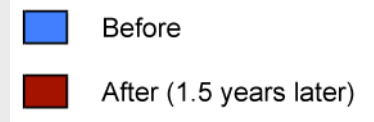
★ Bookings  
49% Improvement

★ Sales per Salesperson  
50% Improvement



★ Market Share  
53% Improvement

And Margins increased 10%  
In high-value, capital equipment sales



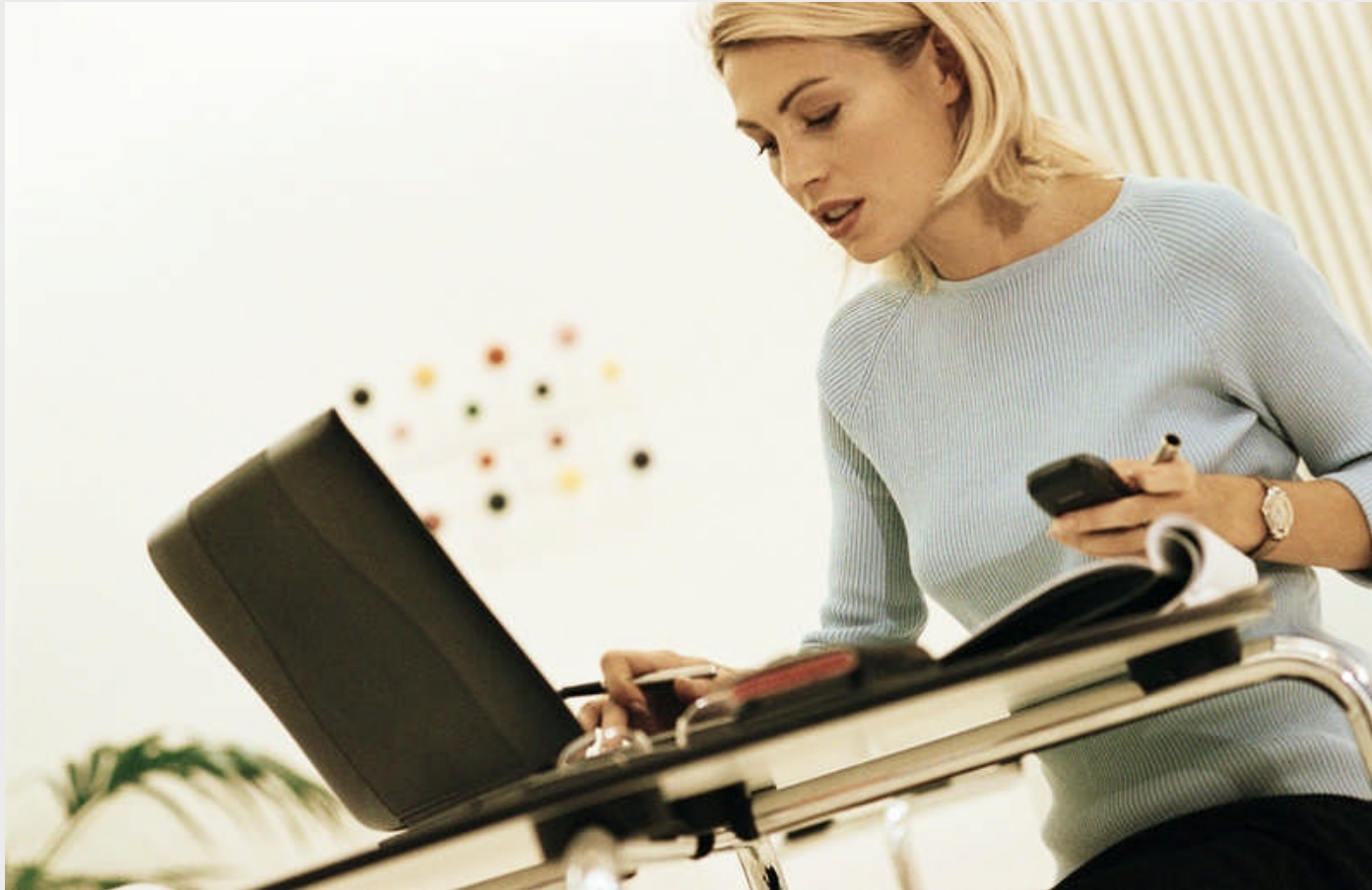
- ▶▶ Goals, Funnel Requirements
- ▶▶ Trends
- ▶▶ SWOT Analysis
- ▶▶ Strategies / Tactics
- ▶▶ Accounts
- ▶▶ Opportunities
- ▶▶ Partners
- ▶▶ Activities
- ▶▶ Management Support, Approval





**PLAN to WIN**

# Integrating the Sales Plan into CRM



- ▶ On-going, online implementation of the plan
- ▶ Easier team participation
- ▶ Plan is more visible for coaching, best practice sharing
- ▶ Track progress vs. strategies and action items
- ▶ Management reporting
- ▶ Access to other information



- ▶ Focus on helping sales people sell
- ▶ Make it easy to use
- ▶ Include only what is really useful
- ▶ Leverage CRM objects, functions
- ▶ Share with Territory/Account team members



Numbers

Personal Plan

Trends

Goals

Narrative

**TerritoryPlan Detail**

[Edit](#) [Delete](#) [Clone](#) [Generate PDF](#)

TerritoryPlan Name Net Aide 2011  
 Owner [Ron Snyder \[Change\]](#)

▼ Corporate Plan / Quota

Average opportunity size	\$400,000	Territory sales goal	\$2,000,000
Close ratio	50%	Sum of closed opportunities	\$400,000
Number of new wins needed	4	Additional sales from existing base	\$0
		New sales needed	\$1,600,000.00
		Pipeline needed	\$3,200,000
		Sum of open opportunities	\$500,000
		Pipeline gap	\$2,700,000

▼ Personal Plan / Quota

Territory sales goal	\$2,500,000	New sales needed	\$2,100,000
Average opportunity size	\$400,000	Additional sales from existing base	\$0

▼ Territory Overview

Industry trends impacting your territory: Need to minimize risk related to data security. IT reluctance to spend \$\$.

Key trends in your geography: Concern re the economy.

▼ Behavior and Territory Goals

- Territory Goal #1: Increase opportunities in funnel by 50%.
- Territory Goal #2: Generate 3 new large accounts.
- Territory Goal #3: Sell our new product.
- Territory Goal #4: Increase territory market share by 20%.

▼ Narrative

Territory narrative: There is stiff competition and reluctance to use funds. We need to generate new opportunities, especially in larger accounts.

Additional issue / info to consider: How do we compel customers to buy?

**Strength, Weakness, Opportunity, Threat**

[New SWOT](#)

**SWOT**

[Strength, Weakness, Opportunity, Threat Help](#) ?

Action	Type	SWOT Description
<a href="#">Edit</a>   <a href="#">Del</a>	Strength	Making data accessible around the world and recovering damaged data
<a href="#">Edit</a>   <a href="#">Del</a>	Weakness	Economic concerns effect our business.
<a href="#">Edit</a>   <a href="#">Del</a>	Opportunity	Globalization means demand for our hardware is growing.
<a href="#">Edit</a>   <a href="#">Del</a>	Threat	Slow-downs in the media & entertainment and telecommunications industries.

**Strategies**

[New Strategy](#)

**Strategies**

[Strategies Help](#) ?

Action	Strategy	Tactic
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Create case studies</a>	Generate list of candidates, create case studies
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Promote new product</a>	Identify and sell to candidates in installed base.

**Open Activities**

[New Task](#)

[New Event](#)

**Activities**

[Open Activities Help](#) ?

Action	Subject	Name	Task	Due Date	Status	Priority
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">Generate list of new product candidates</a>		<input checked="" type="checkbox"/>	9/30/2011	Not Started	Normal
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Meet with territory team re new product campaign</a>	<a href="#">Joan Wittiker</a>	<input type="checkbox"/>	10/3/2011 10:00 AM		

# PLAN to WIN

# Accounts, Opportunities, Partners

## Target Accounts

[New Target Account](#)

## Accounts

[Target Accounts Help](#) ?

Action	Account Name	Type	Account's compelling needs	Our differentiators	Our sales approach
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Env Protection Agency</a>	Customer - Direct	Demand for large storage devices. Must keep data safe.	Total systems approach; store more data and faster transfer rates.	Leverage our current success in the EPA and other gov't agencies.
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">FDA</a>	Customer - Direct	more secure, faster data storage	faster data transfer	leverage success with EPA and other agencies

## Target Opportunities

[New Target Opportunity](#)

## Opportunities

[Target Opportunities Help](#) ?

Action	Opportunity Name	Type	Account Name	Amount	Stage	Probability (%)	Close Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">EPA data storage</a>	Existing Customer - Upgrade	<a href="#">Env Protection Agency</a>	\$500,000.00	Value Proposition	50	11/11/2011
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">FDA data storage</a>	New Customer	<a href="#">FDA</a>	\$400,000.00	Closed Won	100	9/26/2011

## Partners in your territory

[New Partner](#)

## Partners

[Partners in your territory Help](#) ?

Action	Account Name	Contact	Partner relationship	Partner strategy
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">EMC</a>	<a href="#">Jack Lewis</a>	Strategic Alliance (Corporate)	Develop plan to win at FDA and jointly implement it.
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">IBM</a>	<a href="#">Dan Donaghan</a>	Strategic Alliance (Corporate)	Jointly create and execute plan to win EPA business.

## Activity History

[Log A Call](#)

[Mail Merge](#)

[Send An Email](#)

[View All](#)

## Activities

[Activity History Help](#) ?

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Set meeting to discuss plan</a>	<a href="#">Jack Lewis</a>	✓	9/23/2011	<a href="#">Ron Snyder</a>	9/27/2011 3:34 PM

## Approval History

[Submit for Approval](#)

## Approval

[Approval History Help](#) ?

No records to display

Compelling Event  
Product  
Criteria  
Differentiators  
Process  
Sales Approach

**Target Opportunity**

Save Cancel New Opportunity

**Plan Information**

TerritoryPlan Net Aide 2011  
Opportunity EPA data storage

**Process Information**

Account's compelling needs/  
events ⓘ Increase data storage and security.

Our product / service ⓘ Virtualization-aware networks.

Account's decision criteria ⓘ Switch performance, tiered storage, management software, security.

Our differentiators ⓘ Switches, tiered storage, management software and security.

Account's decision process ⓘ Conduct analysis of top 3 competitors, make recommendation, present to decision committee.

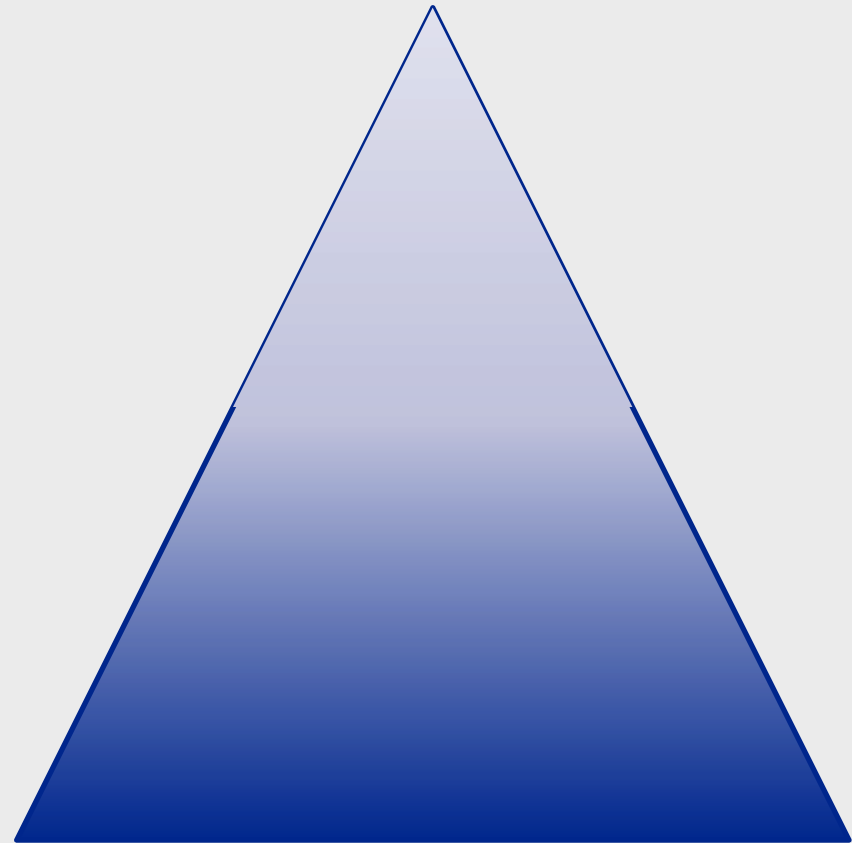
Account's funding/ budget  
process ⓘ IT Director presents budget to budget committee for approval.

Our sales approach ⓘ Leverage our current wins, demonstrate our superior transfer rate.

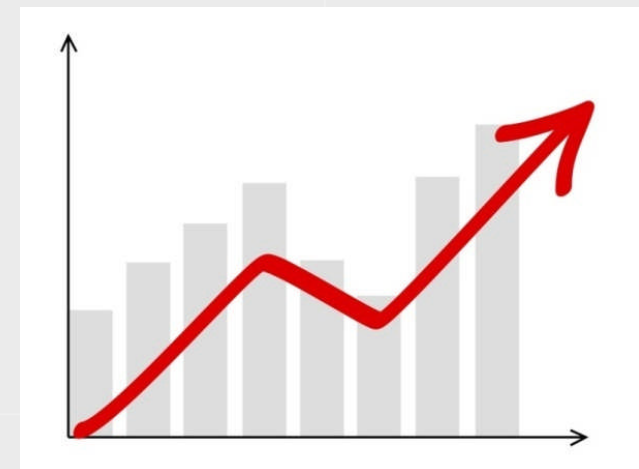
- Be Proactive
- Use CRM tools
- Manage Territory / Time
- Guide Progress



1. Sense of Urgency
2. Sponsorship
3. Vision & Strategy
4. Communicate
5. Ensure Action
6. Short-Term Wins
7. Broaden Adoption



- Sales Planning has a BIG payoff.
- Technology is necessary, but NOT sufficient.
- Your efforts must be ALIGNED.
- You must engage ADOPTION.



See Appendix A



Strategic Account Management Assoc.



# PLAN to WIN



*You've got to  
PLAN to WIN!*

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