

## Vital Planning Disciplines for Sales Professionals

Whether a seasoned veteran salesperson or a green new-hire; Whether good economy or sluggish...

There is always a risk that in day-to-day business, salespeople will be distracted from proactive activities.

We can get caught up in the urgent— with quote requests, keeping customers happy, and putting out fires. Now it is time to proactively SELL and be “order makers” – not “order takers”! George Bernard Shaw observed, *“The people who get on in this world are the people who get up and look for circumstances they want, and, if they can’t find them, make them.”* This requires some vital planning disciplines that will assure success for sales professionals: territory planning, strategic account planning and pre-call tactical planning!

### ***TERRITORY PLANNING:***

If you do not run your territory – it will run you! Many salespeople seem to struggle with time management. But time management improvement is not as illusive as it might seem. The key is getting ahead of the game with *planning!* The first step is to conduct A-Z evaluation of all the accounts under your care. In a reasonable period of time, call through each of your accounts and update your profile information on each. Update and evaluate sales performance, margin, competition, potential, contacts, etc. As you do this, group your accounts A,B,C,D based on some agreed criteria and call frequency guidelines. This will help prioritize your future territory activities.

Then, one of the ongoing territory planning disciplines is week/month ahead planning. Schedule proactive appointments with customers much more often instead of just dropping in or responding to incoming requests. Divide your territory into quadrants or segments and focus on an area each week of the month. Set appointments as much as possible, well ahead of time, and “live by your calendar”! Of course you will need to be flexible and adjust to emergencies and hot deals –but let that be more of the exception, than the rule.

### ***STRATEGIC ACCOUNT PLANNING:***

There is some significant business that will not just land in your lap or happen by accident. You must make it happen *on purpose*. If the market shrinks or the economy dips we should avoid ‘scrambling’ or focusing only on the short-term. These are prudent times to lay the groundwork and infiltrate major, selected accounts and win them. Many of these may have been inaccessible or perhaps would not respond to prospecting in the past. Sales professionals must be equipped to implement disciplined, strategic account planning for these selected conquest accounts. I promote utilizing an Account Strategic Planning tool or a detailed customer profile tool to help gather information and visualize the long-term plan of action. From there a projected step-by-step formal plan should be developed and managed. The will to win is not nearly as important as the will to prepare to win!

### ***PRE-CALL TACTICAL PLANNING:***

Most of the time salespeople do the typical prep such as considering the situation or doing some research or reviewing notes on the customer such as past sales, problems, internal politics, personal facts, previous calls etc. That is important – but it is not enough. Often, at that point they just pick up the phone or charge in and “see how it goes”. I call this, “showing up and throwing up”.

I accept the reality that selling is very dynamic and that anything could happen. However, one of the most important disciplines and skills I teach is tactical pre-call planning. When salespeople make proactive calls they are on the “offense” and they should prepare their offense! What will they say to start? What questions will they ask and how will they word them for maximum effectiveness? What benefits of product or distributor value will they leverage? What is their action oriented objective and how will they ask for commitment or action?

My short answer to this question is that before every call salespeople should pre-call plan using the SELL Process tool. SELL stands for Start, Evaluate, Leverage, Lock and each of these steps should be prepared in order to maximize every precious customer interaction. Preparation and ongoing practice are essential. You play like you practice—and sales people just don’t practice enough.

Success will follow when sales professionals initiate planning disciplines and take action. Bobby Knight put it this way. “The will to win is not nearly as important as the will to prepare to win.”

*Don Buttrey is the president of Sales Professional Training Inc. He is the author of The SELL Process, a how-to book on pre-call planning. His company offers in-depth skill development for Sales Professionals. Their sales training includes curriculum for sales managers, sales professionals and sales support. Don will present a workshop on this topic at UID 2018. He can be reached at (937) 427-1717 or donbuttrey@salesprofessionaltraining.com. Check out his website at salesprofessionaltraining.com for more information or to purchase his book.*