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# Plan Your Way To Success And Increase Sales

by DONNA L. COHEN

**If you are like many salespeople, you hit the ground running without doing much planning or having clear objectives for the next quarter, much less the next 12 months. However, successful salespeople get organized by setting aside time to focus on their goals and establish clear objectives.**

Strategic planning based on setting goals is not a complicated process, and it doesn't need to take a lot of time. However, in order to be organized, it's important to start with clarity about what you want to accomplish. Steven Covey refers to this approach as "Beginning with the end in mind."

Many salespeople like to fly by the seat of their pants or "wing it" because they are uncomfortable with details and specifics. They are typically "big picture" focused thinkers, liking concepts and ideas, creating a vision, and setting strategy. While big-picture thinking can set the goal, its achievement is in the details. Details are where the rubber meets the road: they separate action from words! Actually, being successful as a salesperson requires a strategic (big picture) perspective as well as the ability to manage the details. It's impor-

tant to create a vision for yourself. In addition, it's essential to create a specific and realistic plan to accomplish your objectives. By being specific with account and territory planning, for example, you will be able to identify the resources required and pinpoint potential difficulties before they become insurmountable problems.

Proactive planning demonstrates your ability to plan what you need in terms of time, money and resources to accomplish your objectives, versus simply running your territory in "reactive" mode. This is the foundation for being successful in sales. If you've been in sales any length of time you've probably heard the saying, "Plan your work and work your plan."

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## Prioritizing Efforts

Clients often ask: "How do you prioritize, when it feels as though there's 48 hours worth of work to

do in 24?" Or they say: "I'm so overwhelmed I don't know where to start." When you have a clear focus and specific goals, the rest is easy.

Once you've determined overall objectives, determine specifically what you want (personally and professionally) and create a plan that will help you determine the outcome you desire — i.e., increase sales by 10 percent over last year, including adding 10 new accounts.

One way to ensure completion of specific goals is to have clarity about what you want to accomplish. For achieving specific sales revenues, for example, once you have established a specific number, back into that number to determine the specific behaviors and activities needed to accomplish the goal by your team (or you). Create a plan and then work the plan. In the box on page 37 is an example of a plan to increase sales.

Typically, salespeople fail to reach goals for one of two reasons:

- They don't start each day with a clear mental picture of what they will look like when they have reached their goal. Without that clear intention, they forget why they're doing what they're doing and lose their passion and drive to succeed.

- They don't have a detailed plan for reaching their goal and get easily distracted by prospects and clients making unreasonable demands that are unrelated to making sales.

Salespeople establish goals to help them to grow and flourish. Without detailed plans it is easy to get derailed. Plan your specific sales activities on a quarterly, monthly, weekly and daily basis and review your results on an ongoing basis. Sales goals can range from establishing targets for customer acquisition to boosting revenues. Once you know where you want to end up (i.e., begin with

the end in mind) it will make your goal attainment that much easier.

### Aligning Personal and Business Goals

An important factor in truly getting organized for success as a salesperson is a goal-setting program which aligns your personal goals with the company's goals. If you have clarity about why you want to accomplish specific goals, then you have "buy-in" and a willingness to do whatever it takes to get there.

Goals based on what someone else wants you to achieve will typically remain unachieved. We all are motivated by our own reasons, not anyone else's. When you break down your tasks to distinct activities, you start to understand which specific activities will help you to achieve and even exceed your goals. Goal setting keeps you focused on the important stuff. It provides a foundation by which to

measure progress. It prioritizes the "to do" items on your list and simplifies time management challenges. The ability to set goals and map their achievement transforms an average entrepreneur into a great entrepreneur, and a great entrepreneur into an outstanding one. Goals serve as a foundation to show you how far you have to go, and they also define the milestones you pass on the way to accomplishing your vision. If you set goals for monthly sales, gross profit, and track each one monthly, you will know where you've been, where you are, and how far you have to go. Goals make your overall vision attainable. You won't achieve your goals in a single step, but many small steps will lead to one giant leap. □

### Major Action Steps, January–December

1. Reduce time to service small accounts.
  - a. Identify all customers not purchasing \$5,000 per month.
  - b. Determine sales potential of each target customer.
  - c. If potential is less than \$5,000, transfer to inside sales.
  - d. Inform customer and schedule call from inside sales.
  - e. If potential is \$5,000+, develop account plan.
  - f. Implement program.
  - g. Evaluate and report results.
  - h. Increase minimum calls to 10 per day.
  - i. Analyze work methods of other high-producing sales reps.
  - j. Discuss lead disbursement with manager.
  - k. Determine most effective territory approach/strategy.
  - l. Evaluate and report results.



#### ABOUT THE AUTHOR:

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