
Mutual Action Planning

by PAUL PEASE



Mutual action planning is a way to pro-actively and strategically grow a sales territory through a team effort of the field sales personnel and the home office. Managing the sales force through mutual action planning not only creates a document for engaging the home office with the field sales force, but it reduces the friction of negative relationships by defining objectives, accountabilities and milestones instead of waiting for crises to erupt, slowly eroding relationships to disappear, and incessant finger-pointing when things go wrong. It is also the nexus to which all other aspects of successful sales management connect.

The key to mutual action planning is to engage the field salesperson in the development of the mutual action plan. The steps to the process are:

1. Each person — the home office manager and the field salesperson — creates their *wish list* for the salesperson's territory:

- a. Objectives to achieve.
- b. Obstacles to remove.
- c. Behaviors to modify.

Note: Anything goes on the *wish list* — the more, the better. These things include:

- i. New products to develop.
- ii. Products to improve the design, process or quality.
- iii. New people to add.
- iv. New or improved technology systems and tools.
- v. Salesperson habit/ behavior changes.
- vi. Home office habit/ culture changes.
- vii. Localized marketing strategies and tools.
- viii. New target customers/ markets to go after.
- ix. Certain competitors to stay ahead of or take advantage of.

2. Each person then prioritizes their wish list per the following criteria:

- a. Priority List #1: What's most important to you to least important?
- b. Priority List #2: What is most to least important to the other person?

3. After prioritizing the list per step 2, then each person sends the other their list to compare and discuss. Discussion guidelines:

- a. Look at each other's Priority List #2 to see if these priorities are actually in line with the other person's thinking. Also compare:
 - i. Common elements of the lists.
 - ii. Missing elements on the lists.
 - iii. Elements that are really not of strong interest at all on the lists.
- b. Look at each other's Priority List #1 and compare:
 - i. Common elements.
 - ii. Elements you each agree are important.
 - iii. Elements you don't agree are important. It's OK to agree to disagree.
- c. Pick the top two-to-three elements you both

Wish List Important Objectives — Field Salesperson

Wish List Important Objectives — Regional Manager

Prioritized Lists

Most Important to the Salesperson	Believed Most Important to the Sales Manager
1	1
2	2
3	3
4	4
5	5
6	6

Prioritized Lists

Most Important to the Sales Manager	Believed Most Important to the Salesperson
1	1
2	2
3	3
4	4
5	5
6	6

Mutually Agreed Actionable Important Territory Objectives from Wish Lists

1
2
3

Sample Approach: Mutual Action Planning Gap Analysis Sheet

Current State (Second)	What/ Who/ When (Third)	End State (First)
Current State of #1	What Who When How (by who) Feedback method/frequency	Agreed Important Objective #1
Current State of #2	What Who When How (by who) Feedback method/frequency	Agreed Important Objective #2
Current State of #3	What Who When How (by who) Feedback method/frequency	Agreed Important Objective #3

Mutually Agreed Currently Non-Actionable Objectives, Prioritized for Future

1
2
3
4
5
6

Remaining Items — “Agree to Disagree” List

agree are important. Take on the tough ones — they tend to fix the others.

- i. More than three elements to work on is too many.
- ii. There should be at least one element that is the primary responsibility of the field salesperson and one element that is the primary responsibility of the home office manager.
- iii. Prioritize the rest of the list and put *on hold* for the future.

4. Create a gap analysis per the following chart with these guidelines:

- a. A three-column chart.
- b. Should not be more than two pages total — keep it focused.
- c. Set goals first (third column).
- d. Establish current conditions (first column).
- e. Develop bridge:
 - i. What is to be done?
 - ii. When is it to be done? Timeline needs to be:
 1. Long enough to get it done right.
 2. Soon enough to create operational urgency.
 - iii. Who is responsible?
 1. Primary responsibility.
 2. Secondary responsibility. *Always* have a back-up.
 - iv. How is this to be done?
 1. Tactical details are not needed here — they are the responsibility of the person chartered to drive the activities.
 2. Divide and conquer: By dividing the project up into smaller defined mini-objectives:
 - a. The mini-end states of each portion of the project become more appealing to take initiative versus looking at a huge project that can be intimidating to start.
 - b. The mini-projects become milestones for periodic project progress updates.
 - v. Feedback:
 1. Mechanism for feedback.
 2. Frequency.
 3. What is to be accomplished and reported with each feedback? This is where the mini-milestones of the divided-up project are beneficial.

Everything seldom goes to plan, according to three-time Indy 500 winner Bobby Unser. Winning 11 of 37 races he drove for Roger Penske, Unser was the most prolific race car driver in Team Penske history. Both Bobby Unser and Roger Penske were consummate planners — and their record as a team shows it. Unser said the plan changed as soon as the race

started — then it was the team that adapted the quickest that won the race. The key to planning on his part was that Unser, the pit crew and Roger Penske were operating from the same mental planning reference point, so they could adapt more quickly. The teams that didn't have a plan before the race started had no chance of winning at all. Even if things don't go according to plan, without a plan to begin with, you've lost the race before it's even started. Likewise, by planning, you put yourself immediately ahead of the competitors that don't plan.

Yes, this is a lot of front-end work. But, whether I was an engineer in the '70s, a rep in the '80s and '90s, or a consultant offering advice today, I really found it (and still find it) boring to have the same battles, the same conversations, and hear the same complaints about the status quo month after month, year after year. No problem is solved until it is attacked. The biggest problem between field sales and the home office today is a lack of mutually-agreed-upon objectives in the spirit of cooperative team selling driven by each party's desire to grow. Mutual action planning doesn't reduce the hours you will work. You will still work 50, 60 or whatever hours a week with mutual action planning. The difference is at the end of your 60-hour status quo work week you will be exhausted and drained, but at the end of your 60-hour mutual action planned work week you will feel accomplished. No short-term pain, no long-term gain. □

ABOUT THE AUTHOR:

Paul Pease is a sales trainer and consultant specializing in rep-principal sales and relationships. He is a 20-year rep veteran and MANA member. Paul's business emphasis is profitable revenue growth through customized programs. He is an instructor for the UCLA Business

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