

Building your One Page Sales Plan.

“Clarity on your goal and your path to attain it, is half the battle”

To create your plan there are five key steps;

- 1) Goal Setting
- 2) Forecast your BAU
- 3) Calculate your GAP
- 4) Fill your GAP
- 5) Create your plan

The outcome of your plan should be a simple 1 page plan that give you clarity on what you need to do each week to achieve your goal.

Step 1 – Goal Setting and Time Frames (The WHAT)

What is your sales target for what time frame?

(A) Sales Goal \$ _____

for period starting _____ and ending _____

Step 2 – Forecast your Business As Usual (BAU).

Now that you've set a goal, we need to see how close you'd get to it if nothing changes, and then in step #3, we can calculate our GAP.

This step can be a little tricky and at the end of the day is a guess. By using the following methods, forecast your best estimate for your sales production assuming nothing changed throughout the period you are planning for.

- Review historical sales for same period over the previous 1-3yrs
- Look at your major customers and ask “is there any reason their buying patterns are going to change from historical over this period?”
- Look at your prospect pipeline and forecast what you believe will come in over the period you are forecasting for.

Note: it is really important to make these figures conservative. I.e. make them lower than higher. If you give yourself an optimistic BAU forecast, your pro-active strategies will be less aggressive, and then if your BAU does not live up to forecast, you'll miss your goal. Always play on the safe side.

With the information you've gathered above, write in below, the sales you believe will be generated in the period if no additional activity was done

(B) BAU Forecast for planning period \$ _____

Step #3 -Work out your GAP.

Calculate your GAP by subtracting your Business As Usual (BAU) forecast from your Sales Goal

(A) Sales Goal \$ _____

(B) BAU Forecast \$ _____

(C) GAP (A)-(B) \$ _____

Step #4 – Fill the GAP (The WHO)

There are two ways you can fill the GAP; new business from existing customers (preferable), or business from new customers.

#4a) Existing Customers

Your first step is to look at your existing customer list and ask:

- “Which of my existing customers has the greatest opportunities to increase my wallet share”,
- “What else do my customers need that I can provide them?”
- “What are they buying from someone else they could be buying from me?”
- “What ideas might I be able to bring them that could introduce new products or services to them ... i.e. what don't they know about that I/we do?”

Once you've done this, estimate a conservative amount you might aim to draw from these existing clients. And be sure to keep track of your answers to the above questions. This will form an important part of your sales plan.

(D) Existing Clients Opportunity \$ _____

#4b) New Clients

- Looking at your 'A' and 'B' type clients, what is the average spending volume for each?

(E) Ave Annual Client Spend \$ _____

- Now using the number above, what would be a conservative spend estimate for a *new* client in the time period we are planning for.

Remember, in most cases, clients usually have a 'ramp up' time before they hit their optimum spend volume.

- Now how many New Clients do we need to complete filling the GAP?

GAP (C) \$ _____

minus (D) \$ _____

divided by **(E) \$** _____ equals **(F)** _____ # new clients needed

- Now we need to divide that number by your prospect conversion rate. I.e. how many prospects do you need to speak with/connect with/give demos or trials to in order to generate a sale?

(F) _____ / conversion rate _____ % = **(G) # Prospects** _____

#4 Summary

(A)	Sales Target	\$
(B)	BAU Estimate	\$
(C)	Your GAP	\$
(D)	Your Existing Customer Opportunities	\$
(E)	Average spend of a good customer	\$
(F)	# New Clients Required	
(G)	# Prospects Required	

Step #5 – Create the Plan.

The purpose of doing this whole exercise to date is to determine what level of pro-activity is required in order for you to achieve your target. Knowing this allows you to plan your activity and your time. If for instance your BAU is pretty close to your target, you know your activity just requires some tweaking But if your BAU is only 50% of your target, we have some massive action to take.

So let's take a look at flushing out the details on filling the GAP.

#5a – Existing Customers

Going back to your work on section 4a, list out the customers that you see opportunity in. And for each of them, make some notes so you know what action needs to be taken. I.e:

- Inform them of XYZ product
- Refer them to B Corp who we will get a commission from
- Ask to quote on their other work etc.
- You get the idea.

5b – New Customers

This is the area that usually requires some more attention. - new customers means prospecting. There are two categories of prospecting; Direct and Indirect. Below are a few examples of each

Direct (usually leads to faster results – or known as 'hunting')

- Asking for referrals (from customers, prospects, Strategic Partners)
- Networking (where your 'A' prospects are)
- [Strategic Partnerships](#)
- Seminars and events
- Direct Mail
- Trade Shows
- Cold Calling (down the list in my books)

Indirect (longer term but more sustainable results – or known as 'farming')

- Volunteering
 - Industry associations
 - Charities
 - Other associations
- Indirect Networking
 - Rotary
 - Sports clubs
- Article publication (LinkedIN, company or personal Blog, industry magazine, Strategic Partners publication/blog/website/newsletter)
- Becoming known for something 'an industry expert'
- Video publication
- LinkedIN Group hosting or involvement
- Host Beneficiary Event

This list is obviously not exhaustive but provides a starting point. If you've got other strategies by all mean include them in your plan.

The key step with each of these strategies is to choose 2 or 3 that fit with your talents and strengths and give you the highest ROI on your time and money (which ever you are investing).

After you've chosen your preferred methods (which we refer to as your critical activities), you need to allocate a magnitude of activity to them. I.e. if you pick networking, how many events each month will you attend? If it is Strategic Partnership, how many people will you need to approach and who? Essentially we need to get to the nitty gritty detail so you are 100% clear on what you are going to do and when.
Fill in your critical activities below.

Critical Activity Schedule

Critical Activity	Frequency or Date of execution	Notes

BONUS Section

Critical Non Essentials (CNE's)

The term CNE comes from Dr Paddi Lund, the crazy dentist who revolutionized his practice from low profitability serving 'D' type customers to a high margin invite only clientele. He did many things but one that stood out was his CNE's. For more info, read his book "The Happiness Centered Business".

CNE's are the things you do for your customers that go over and above the expected. It might be just a small touch like a hand written card that says thank-you. These actions or gifts are often small from a monetary point of view but create a memory in your client that says you care about them.

Suggestions

- Hand written card
- Unscheduled call just to say thanks
- Celebrate a personal event in some way (recognize marriage anniversary or work anniversary)
- Tickets to a game
- Invite them to an event you are attending
- Refer them to someone (i.e. help them build revenue)
- [Paddi Lund's list](#)

BONUS Section #2

Your sales are only as good as you are ... therefore if you want better sales, BE better at sales.

Every high performing sales person I know is a learning fanatic. Now I don't think you have to be fanatical (although I'd highly recommend it) but you do need to be continually learning in a proactive way or you just get left behind.

In your Sales Plan, include some education. Review the areas where you know you could perform better or where you have little knowledge and reach out for some advice on what to read/watch or listen.

For more on this, access the client area on our website, click on "Sales Mastery" and choose from the video's there to build your awareness of the options available to you, in reference to growing you.

BONUS Section #2

More detail behind building your Critical Activity Plan.

Critical Activities are designed to:

- Develop relationships
- Build credibility
- Generate sales opportunities

Consider this analogy. Your sales are the equivalent of a balloon. And your sales results are represented by the size of that balloon. Your Critical Activities are the quality and quantity of the breaths that go into blowing up that balloon.

To ensure you have high levels of quality and quantity in your Critical Activities, you need a plan.

Let's look at the three core types of Critical Activities and the toolbox you can choose from to put into your plan. Where you are in building your portfolio of clients will determine the mix you will need. Resist the temptation to load your plan with all short-term measures if you need results now. If you do that you will always be looking for short term measures. Add some longer-term strategies into the mix (e.g. publishing content) and in time you will have more inbound leads and need to less of the outbound shorter-term strategies.

1. Building credibility

How well are you known and how well are you known for what you are good at. Too often salespeople operate in the shadows and feel their only job is to convert opportunities to sales. While that is an important part of the role, when it comes to making sure you've got lots of opportunities to convert, developing that inbound marketing engine is critical. And yes, your company should ideally be doing some of that, but let's not leave your success up to the actions of others. Take control and build your own machine.

When people need your product or service, what do they do? Who do they ask about it? What do they search for online? Your goal is the build a treasure trove of content that will make you and your expertise a household name for anyone with the problem you can solve.

Critical Activities for Building Credibility

- Gathering Testimonials (written and video) – publish them.
- Publishing Knowledge
 - Blog
 - YouTube
 - Social Media
 - Book
 - Whitepaper
- Publishing Tools
 - Checklist
 - How To's
 - “7 things to know before buying”
- Speaking

2. Building relationships

Building relationships is about becoming valuable to others and operating from a win/win philosophy. It's not about having as many people as possible that you can ask for referrals. Always approach relationships with the Golden Rule in mind "do unto others as you would have them do unto you". It's a winning formula.

You'll see from the outline below, there can be a bit of work in this. The great thing about that is that no-one else is doing this. Only the elite in their field go to this much effort, so if you are willing to put in the work, you'll join the ranks of the few who are leaps and bounds ahead of the rest.

Key Philosophies in Building Relationships

- It's not about you. It's about them
- Always look to add value to others. How can you help them build their business? What else do they need aside from what you can do for them?
- Know what the ideal relationships look like so you can identify great candidates to invest in.
- Have a vision for your networks. i.e. I have a group of 7 key relationships (branch connections, realtors, lawyers, financial planners, accountants) who work closely together to cross refer.

Actions:

- Build your Strategic Alliance wheel.
- Rate contacts as A, B, C or D or Unknown. Eliminate C's & D's
- Fill out your Mackay 66 (as developed by Harvey Mackay) for A's and B's
- From there, develop a list of:
 - Looking at my Mackay 66, what else do I need to know about my A's and B's?
 - From what I know about my A's & B's (from my Mackay 66), what can I do this quarter, month, week or day to move me up in my contacts consciousness (think personal and professional touches)
 - Looking at my SA Wheel, where do I need to add more connections? Which of my A's can I ask for a referral to another potential A in that category? What value can I add to them?

Generating Opportunities

At the end of the day, you need to generate sales opportunities. Having specific activities that will make that happen is critical. Much of this list will build from the work you've done in the previous two categories however some is purer short-term results orientated. It's the hustle of getting it done.

Critical Activities for Generating Opportunities and Moving Sales forward

- Asking A-level customers for referrals (as long as you've earned them)
- FOLLOW UP Always, always, always follow up with people in a professional, empathetic and assertive manner. If you believe you are bothering people, either it's your style, approach, offering or your mindset that is the problem.
- Trade Shows
- Proactive touches with SA's (lunches, notes, referrals for them, invitations to events, information they may be interested in, things aligned with their personal interests –see Mackay66)
- Sending hand written thank you notes/cards
- Running a seminar or info session
- Host Beneficiary event (you speak at someone else's event). Add value for your host and their clients
- Cold Calling (least effective but it does work)
- Networking – events where your ideal customer will be hanging out.
- Networking – professional groups that you join or belong too (Chambers, Rotary, Leads groups).
- Charity involvement – a chance to build relationships with people you might not otherwise get access too.
- Direct mail with phone follow up
- Working your LinkedIn connections. Connect with people, share content and connections. Be valuable.