BUILDING THE BRIDGE TO YOUR TARGET MARKET CUSTOMERS

Executive Overview for:

The 10-10-10 Sales Call Planning and Sales Call Review Process

"I have always said that if I was forced to list the 6 most important forms (processes) in a company, the 'Call Plan and Review' Form would rank number 4 after the Strategic Plan, the RROI- Position and Performance Agreement and the Product-Market Set selection and would be followed by the Voice of the Customer and Red Zone New Business Hit Rate Form.

While this segment is short, it is where your entire marketing and sales efforts convert to the critically important time we spend in front of the customer presenting your value proposition. This is truly where the sales tire meets the customer road. This is the form that tells you if our sales effort is effective and, most importantly, if you are in a position to grow your company. If you commit to the implementation of just one process for building a bridge to your target market customers, please put a process around the 10-10-10 Sales Call Planning and Sales Call Review Process."
- YourBoard.US

1. Overview of the Sales Call Plan and Review Process
2. Directions for the Sales Call Plan and Review Form Format

The Individual Business Development Sales Call Planning and Review Process

I know from both personal experience as a sales person, a district and regional sales manager and a VP of sales for an 18 million, a $100-million company and a $5-billion company that anything that sounds like the term "call report," is not welcome. It is where perfectly good people learn to lie. It generates anxiety and frustration.

However, there is no effective process of any type in the world that does not have a measurement of some type, especially for the company's most important process and the single most important process output, which is time in front of our targeted customer presenting our solution (sales visit), that will lead to sales at some percentage hit rate.

Every person in a highly successful organization is accountable for producing results within their role. Business Development is no different.

Each Business Development Professional is responsible for planning and executing a schedule that places a large majority of their time in front of, or in contact with, a targeted buying or specifying influencer.

Directions for the Sales Call Plan and Review

1. As customer visits are booked, you record them in the week they are booked. Also, indicate the customer's designation in the 10-10-10: AM, AT, T, P, Pre-qualified.
2. Each week, each sales person and the Sales Support Team review the previous week's calls to download information and market intelligence and also list the needs that may have developed as a result of the customer visit.
3. At the same weekly meeting, each sales person shows his planned calls for the current (coming week} and makes any support request for information or presentation/demonstration materials needed for those confirmed customer visits.

Note: The attached form is intended to be an example. We would assume that many people develop their own electronic form or incorporate it into your CRM.

10-10-10 Weekly Call Plan and Review

A Successful Business Development Planning Process that creates a focus on quality relationship development and presentation time in front of the targeted buying influencers.

10-10-10 Weekly Plans and Activities

Business Development Person: _____

Territory: _____

Date: _____

Plans for Week of: _____**(upcoming week)**

10-10-10

Weekly Plans and Activities

Date: _____

Actual Visits Made Week of: _____**(last week)**

Date	Customer	10-10-10 Category	Visit Plan or Webinar Plan	Call Made √	Contacts Made	Comments on Visits
MON						
TUE						
WED						
THUR						
FRI						
OTHER						

Planned Stay-in-Touch Wk. of:

Follow-up calls or e-mails planned for next week _____

Actual Stay-in-Touch Wk. of

Follow-up calls or emails

Made this week _____

Instructions: Each week in the Sales Review Meeting the Team reviews both the original plans for personal stay-in-touch calls or e-mails (recorded from the previous week) and the actual stay-in-touch e-mails or calls made.

In addition the sales associate lists his planned stay-in-touch e-mails or calls, on the next weeks form (similar to the sales call plans) for the upcoming week (left section above)

The Business Development Associate in each weekly sales review, as part of "call planning and review" agenda item, reports two things:

1. The Call Plan, put together for last week and the actual results from last week measured against that Plan.
2. The Plan for the upcoming week (a new form). The results for the upcoming week's plan will be reviewed in next week's meeting.

Overview of the Sales Call Plan and Review Process

Yes, Virginia, there is a Santa Claus…and yes, everyone, there is a Call Plan Review Process at any company where sales growth and efficient sales processes are important to the Leadership of the company.

The difference is that the Sales Call Plan and Review Process is not negative and is, certainly, not designed to be the basis of punitive action.

This Call Plan and Review Process is designed to determine and measure if you are able to make the number of customer sales visits you had jointly planned on and also if you are making those sales visits proportionate to the priorities laid out in the 10-10-10 Sales Process. You can also assess if you are doing the right things in marketing to create new prospective lead opportunities.

This Call Plan and Review Process is designed so that as you book appointments two and three weeks in advance, the support team can assist in doing customer research and putting the right information together that will allow you to deliver a customized "killer" presentation or demonstration.

This Call Plan and Revenue Process is designed for reviewing the sales call after it occurs to determine what follow-up needs the sales person might have in order to meet the commitments made to the customer for information, samples, references, case studies, performance data, etc.

This Call Plan and Review Process is also designed for gathering competitive market intelligence so that assessments can be made to determine if it is necessary to adjust your strategies or react in some way. It is also a good source of information on the need for new or improved sales tools or presentation materials.

The Sales Call Planning and Review process also allows the entire team to plan and execute the sales calls based on the 10-10-10 Customer Prioritization Plan in order to monitor the selling time we are investing in the different target market categories.

What I have observed over time is that with no "sales call plan" in place, the sales team drifts toward current customers. People can always rationalize calling on existing customers. It is always more difficult and requires more research and planning to call on "target" or "prospective customers." New leads and current customers is where the majority of sales calls are focused if there is not a system to track the sales visit allotment you assign to new high potential target or prospective customers.

This Sales Call Planning and Review Process also allows the sales person to monitor their sales calls made against the annual sales call plan that is agreed to at the beginning of each year.

In summary, the overall objective is to place the 200 to 250 sales calls you have in your annual plan with the targeted customers who offer the greatest potential.