



SALES VELOCITY WORKSHOP

90 Day Sales Planning



Program Outline

Developing sales velocity



The purpose of this one or two day workshop is to ramp up your sales engine through a highly engaging facilitation process.

A consistent sales pipeline requires planning and follow up, two things which over our 15 years of sales training and consulting we have seen a distinct lack of within highly commoditised or transactional sales environments.

Our 90 day sales planning workshop provides a thoughtful approach and ease of execution for success.

Each stage has a target dynamic, in other words, a target duration. Likewise it has a target conversion. At each stage a gateway occurs, for example, the Broker acceptance of the trial.

Conversion will vary by product, service, region, etc. Multiplying the conversion at each stage indicates the overall conversion.

The lower the conversion ratio, especially at the later stages, the greater the waste of sales resources.

It is also vital to set targets and to monitor pipeline value and margin in addition to pipeline dynamics.

Session 1: Motivation Through Product Knowledge

The first line of business in sales is to truly understand the feature, need and benefit of your product/service in context to the value it brings to the customer and not through the eyes of your business.

What people say they are comfortable with is often different to what they can do? The group will workshop 3 client scenarios where they need to describe a typical client need, link this to the features (fact) of your product or service and articulate the benefit statement.

This exercise creates the State Change necessary for them to buy into the importance of delivering a concise and clear message.

We then work with the team to consolidate into a simple message that creates buy-in from the broker, articulates the value of your service or product for your broker.





Session 2: Market Analytics

Designed to link with the short, medium and long term activity plan for the 2014 Business Strategy. The content of this session will focus on the following areas:

- Complete a SWOT Analysis on your territory (Strengths Weakness, Opportunities and Threats).
- Develop a strategy for defending your SWOT analysis.
- Analyse the changing aspects at play
- Write a high level assessment of the market in the broker's area.
- To steer the BDM to think about their sales results in the context of where the business will come from.
- Plan the required quantity and quality of brokers needed, together with relationship building activities based on business development criteria
- Understanding the value of their time and focuses on their business development priorities short and long term
- Understand the importance of developing a leverage model
- What to focus on - 'Planned activities produced planned results' approach. It links their activities more accurately to their forecast / pipeline

Session 3: Sales Relationships



This session provides detail on the types of sales relationships you have. The content of this session will focus on the following areas:

- Identify the gaps between your current state and future state
- Clarify assumptions versus reality in respect to loyalty with their broker relationships
- Review their broker base with the loyalty cube to determine whether their relationship is in a positive or negative loyalty position
- Clarify current share of business
- Evaluate the true potential of business sitting within that broker
- Understand the impact of the resistance model to your brokers buying behaviours
- Analyse their offering – concept vs features – what are you truly selling?
- Analyse the relationship of influences and decision makers
- Develop a competitor analysis – determining areas of vulnerability
- Timeline and develop the necessary milestones for cementing client loyalty



Session 4: Sales Activities



This session provides a detailed overview of the types of sales activities needed to generate growth. The content of this session will focus on the following areas:

- Detail how to continue to attract new and manage current broker and referral relationships - calls to meetings ratio in the next 90 days.
- Detail their ongoing business development strategy.
- Identify networking and relationship building activities and how to measure the success of these activities.
- Identify the appropriate support needed to successfully accomplish the above (90 day plan).
- Provide a vehicle for them to better manage themselves through an improved understanding of the quantity, knowledge, skill and focus of activities formula.
- Provides an overview map (of the sales process) required to make better quality business development decisions.

Session 4: Sales Activities

CONT.

The content of this session will focus on the following areas:

- The importance of a systems and processes sales planning methodology which reduces the 'gut feel' factor.
- Provides an analysis of essential conversion ratios, which will help them to improve the objectivity of their total sales activity plan.
- Develop a pre-call analysis on each sales call opportunity to pinpoint broker needs.
- Identify the most cost-effective route for driving new sales into the business.
- Review and action to shorten sales cycles, reduce opportunity losses, raise margins.



Session 5: Competency Development



This session provides a detailed overview of the types of skills sets needed to generate growth.

The content of this session will focus on the following areas:

- Analyse the strength and weaknesses of each individual sales person through DiSC sales profiling.
- Enhance technical skill gap to monitor sales activities.
- Determine individual activity profiles and benchmark.
- Clearly define what competencies (soft skills) they need to implement over the next 90 days that influenced sales success.
- Evaluate these competencies (soft skills) they need to be trained in to achieve their 90 day sales plan.
- Evaluate why inappropriate leads are progressed by the sales individual.
- Evaluate the best equipped person to manage specific Broker types.



Outcomes

As detailed over the last seven (7) pages there are a number of very specific outcomes that are delivered in this program.

We run this program either in a one day session or a deep dive two day session where the outcomes are Broker specific.

Sales growth is driven by sales drive and only when you focus your high value target activities and skill enhancements will you truly achieve incremental sales results.

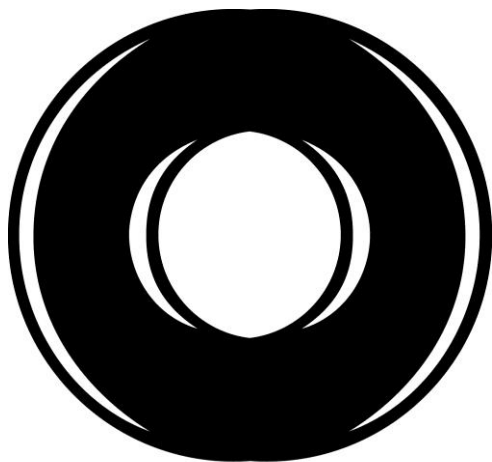
Our 90 Day Planning process of sales activities deliver a tactical strategy with defined skills



Clients



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