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## CONVERSATION

What are the most  
important elements of  
sales planning?

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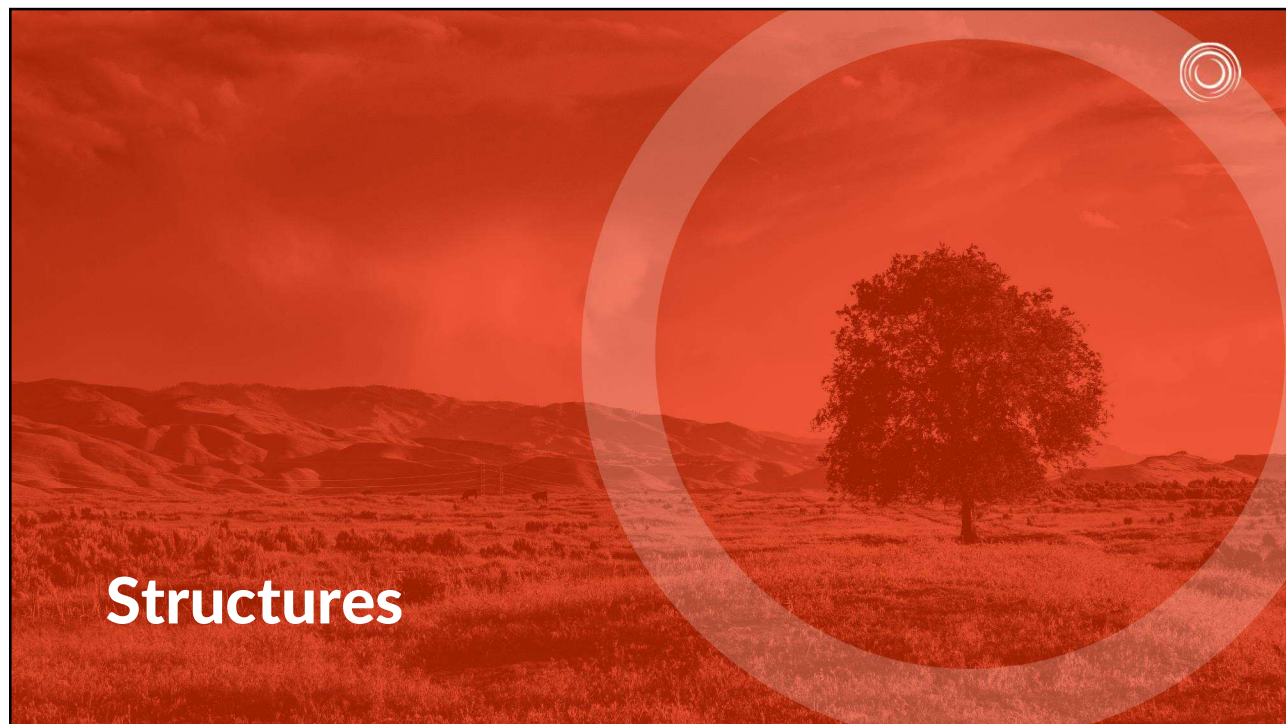
## A Mental Model for Sales Planning

STRUCTURES

STRATEGIES

ACTIVITIES

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S T R U C T U R E S

- Company Strategy
- Territory Design
- Organizational & Role Design
- Talent Acquisition & Onboarding
- Technology Stack & Data
- Solution Sets & Industries

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## CONVERSATION

What is one key goal /  
initiatives for the year, as  
it relates to your role?

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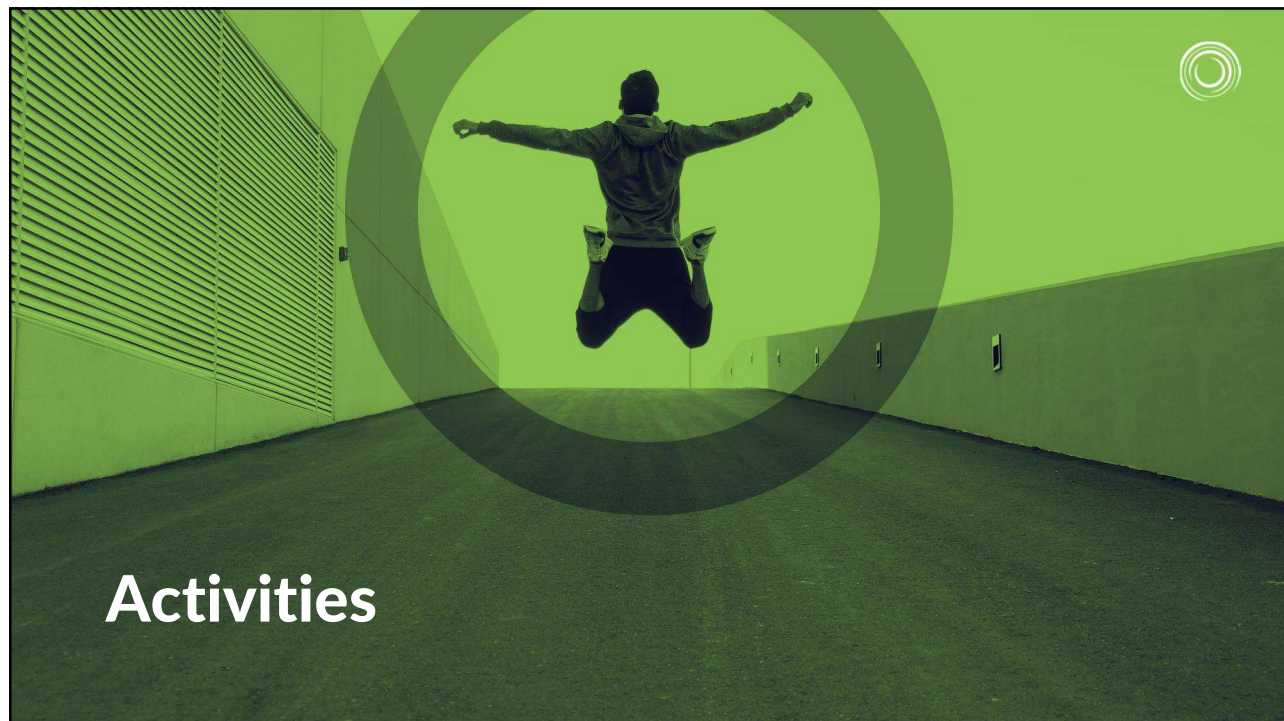
 AMY FRANKO

S T R A T E G I E S


- Territory Plans
- Sales Plans
- Client Selection (org level)
- Verticalization (or level)
- Solution Mix
- Supplier Ecosystem
- Team Development & Performance



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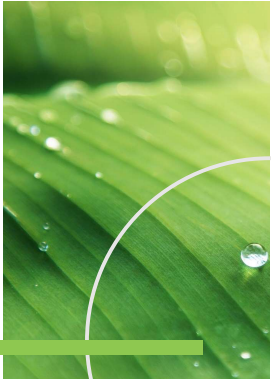
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A C T I V I T I E S

- Individual Sales Plans
- Team Development & Performance



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P O L L Q U E S T I O N

Where do you get stuck  
with the sales planning  
process?

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INDIVIDUAL  
SALES PLANS

- Goals
- Verticalization
- Client Selection
- Personas
- Strategic Alliances
- Brand Profile




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ISP : GOALS

Vision for the Year	[What will my success look like at year end?]
Revenue	[Revenue goals in key verticals, service lines or product categories. May be broken down quarterly.]
Profit	[Bottom-line growth in key verticals, service lines or product categories. May be broken down quarterly.]

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I S P : G O A L S

New Customer Growth	[Number and description of new customers you will add to your existing territory. Ideally categorized by vertical.]
Existing Customer Growth	[Number and description of current clients you are aiming to grow. Categorized by vertical. Supporting CRM data with actuals per key client.]
Gamechanger Goal	[What is a stretch goal for you this year that would be a gamechanger?]

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C O N V E R S A T I O N

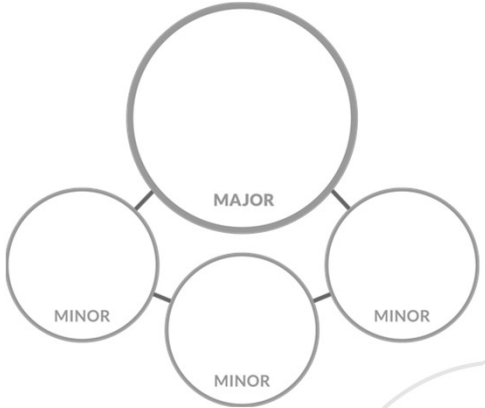
What are some  
gamechanger goals for  
you / your team?

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ISP :  
VERTICALIZATION



- Reviewing your customer set, where do you see patterns of majors and minors?
- In which verticals have I already established expertise?
- Which verticals do I have a passion for or an interest in going deeper into?
- What verticals will have the greatest opportunities over the next 1 – 3 years?

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ISP : CLIENT  
SELECTION

Does the prospect, customer, or selling situation have enough potential lifetime value to invest your time, effort and resources?


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ISP: CLIENT SELECTION

- Philosophical / Values Alignment
- Sales Process
- Solution compatibility
- Post-sales onboarding
- Internal Team Support
- Price / Fee Sensitivity
- Revenue potential
- Profitability
- Administration
- Referenceability
- Logo strength

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ISP: PERSONAS

Decision-maker persona for each key vertical / industry:

- Who is/are your decision maker(s)?
- What are their top responsibilities?
- What are their top 3 decisions?
- What is this person measured on?
- What are their key challenges?
- What will make change difficult?
- What does success look like?

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ISP: STRATEGIC ALLIANCES

What are the key partnerships you will need to accelerate growth? What are the appropriate investments?

- Industry associations
- Centers of influence, both organizational and individual
- Business partners
- Referral partners
- Research organizations

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ISP: BRAND PROFILE

What is your plan to build your digital and offline brand?

- LinkedIn profile; other social media as appropriate
- Events and forums
- Webinars
- Original thought leadership; thought leadership placement
- Podcasts
- Case studies

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## C O N V E R S A T I O N

# What helps you to stay accountable?

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## T E A M D E V E L O P M E N T & P E R F O R M A N C E

### What's your accountability plan?

- Visit your plan twice per month
- The right accountability partner; make it public and consistently report on progress
- Use your plan in 1:1 coaching
- Meaningful activities, scheduled
- Celebrate successes; acknowledge and learn from setbacks as part of the growth process
- Use your CRM and pipeline management

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## CONVERSATION

What is one thing you  
can take action on from  
today's conversation?

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**Amy Franko**

FOUNDER  
Amy Franko Associates

## Connect with Amy

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