

# PRESENT SOS

## CREATE YOUR SALES PLAN

**More Profitable Sales. More Sustainably.  
In Less Time.**

P - PREPARATION

R - RAPPORT

E - EXAMINE

S - SHOW

E - ELIMINATE NO

N - NOW ASK

T - TOTAL AFTERCARE



Ronan Kilroy

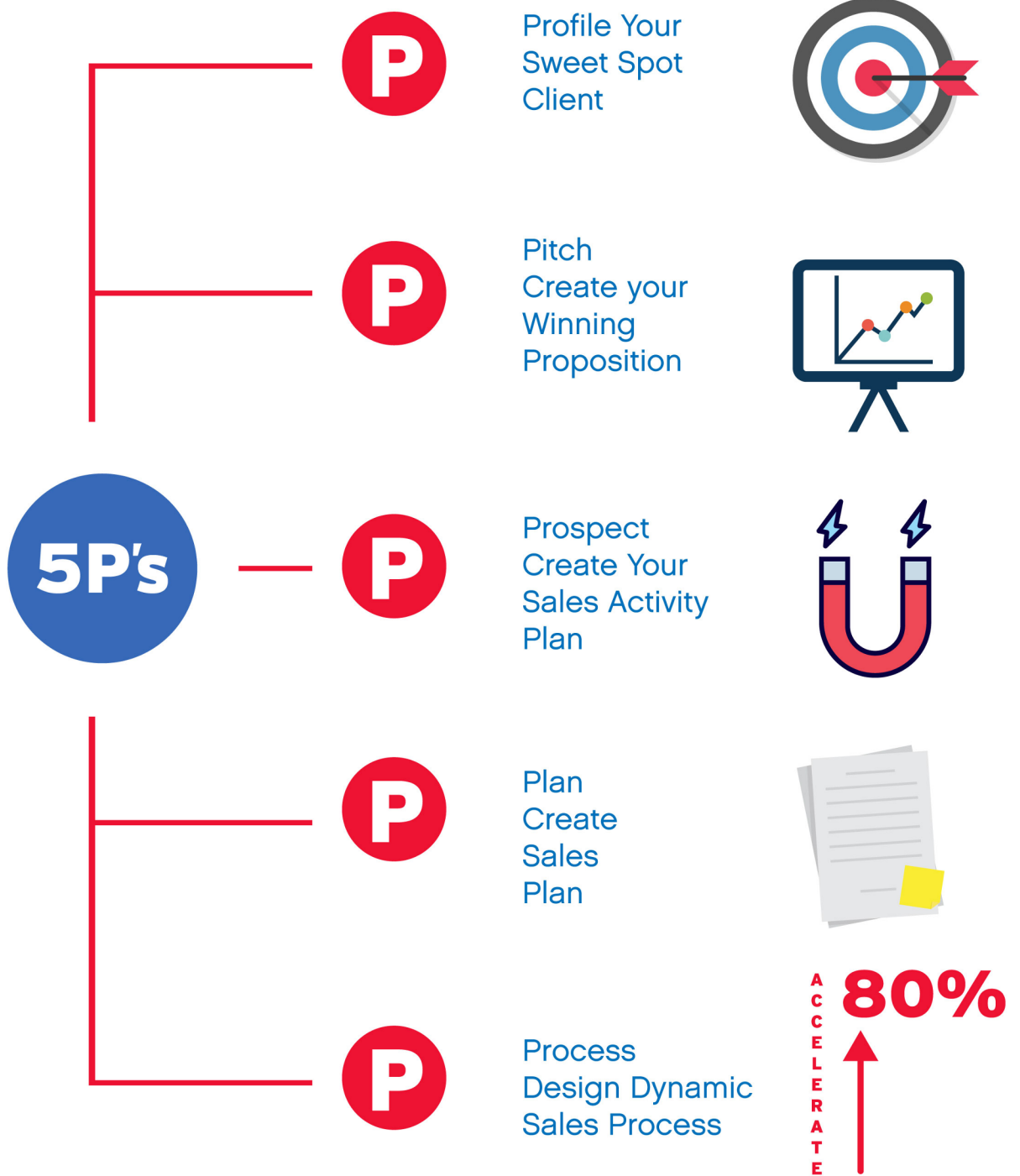
Call Ronan on +353(86) 7732201

Email Ronan [coachronan@insthinktive.com](mailto:coachronan@insthinktive.com)

Insthinktive Sales Leadership Ltd. | Blanchardstown, | Dublin 15, |  
Office 01 8220523

[www.insthinktive.com](http://www.insthinktive.com)

*More Sales, More Consistently, In Less Time*



**Your sales plan is your “road map” for managing your sales. It focuses on sales forecasts, financial forecasts, sales mix, activity goals, and tactics.**

## **IN THIS SESSION**

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**In this session, you'll learn;**

**To have a simple and effective sales plan that covers**

**Goals that are clear, and have actionable steps**

**A sales prospecting plan**

**A sales activity plan to help you achieve your goal**

## **Creating IMPACT Sales Goals**

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**IMPACT goals must be Inspiring**

Goals that don't inspire you are unlikely to motivate you. You must first decide what you really want before you proceed.

**Measurable**

Have clear measures in place in order to know you are making progress.

**Planned**

Set yourself big goals, but be mindful the devil is in the detail. Work out all of the steps involved. Set priorities. Set milestones.

**Actionable**

Create goals you can take action on now.

**Clear**

Your goals should be clear and in writing.

**Timebound**

Your goal should have a realistic timeline.

## **BARRIERS**

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An important step in your goal setting process, is to anticipate all barriers to you achieving your dreams.

Barriers are a part of life and goal achievement. Be completely open about all barriers.

Write every barrier down and develop a mindset that sees barriers as opportunities. Your mindset is important as you try to reach your IMPACT goals.

You must have a "cold and analytical" viewpoint. You cannot allow your emotions control you. You must diagnose all potential barriers and uncover the root causes of the barriers.

Next you will create a plan to help you overcome every barrier.

***“The greater danger for most of us isn't that our aim is too high and we will miss it, but that it is too low and we will make it”  
Michelangelo***

### **Focus on What First**

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Before you begin to remove all barriers to you achieving your goals. Decide what the real barriers are.

For example "our sales are below our targets", may seem like the problem or barrier. But, the root cause of the problem, can be very different.

The root cause could be poor sales people, or poor Sales Processes. It could be that the sales team are not spending enough time selling. It is a sales enablement problem, not a sales problem.

So, diagnose the problem first before, you move to what we do to solve the problem.

Over the next pages you will create your IMPACT goals. Outline your key barriers to achieving your goals. And,

Write Your IMPACT Sales Goal Here

Take your overall Sales Goal and break it down into specific measurable monthly numbers.

	<b>Annual</b>	<b>Quarterly</b>	<b>Monthly</b>
<b>Revenue</b>			
<b># Deals</b>			
<b># Opportunities</b>			
<b># Qualified Leads</b>			
<b>#Proposals</b>			
<b># Meetings</b>			
<b>Average Sales Value</b>			

# Sales Prospecting Diagnostic

**Why do customers buy from you?**

**Why do customers NOT buy from you?**

**How much time should you spend prospecting weekly?**

**How much time should you spend researching and planning weekly?**

**What customers are the most profitable?**

**What customer's are the least profitable?**

**When do customers buy?**

**Are customers buying a necessity or a "Nice To Have"?**

**What are their options?**



**What will they do if they don't buy from you?**

**What % of your sales are via Referral? And what % of these close?**

**What IMPACT does your product/service have on customers financially?**

**Is your customer focused on gain or pain avoidance?**

**When do you discuss pricing?**

# Sales Prospecting Process

What is your Sales Prospecting Process?

Take your goal for Qualified Leads and Sales Opportunities and set specific sub-goals for each tactic you will use.

	<b>Annual</b>	<b>Quarterly</b>	<b>Monthly</b>
<b>Referrals</b>			
<b>LinkedIn</b>			



***What are the barriers to you  
achieving  
your sales goal?***

**Write the main barriers to you achieving your goals.**

**Describe in detail what the root cause of this barrier is.**

**What specific actions can you take to overcome this barrier?**

**What are your Top Three Priorities?**

- 1)
- 2)
- 3)

**What actions can you take in the next 90 days?**

**What specific weaknesses do you need to address?**

**What people and resources will you leverage?**

**What accountability systems will you use to ensure your goal is on track?**

**What non-negotiables are necessary in order to achieve your goal?**

# SALES PLAN

## Vision

Try to capture in writing your personal vision of success. Where do you see yourself in 18 months time? What will your territory look like? What kind of clients will you be working with? What sales revenues will you be generating?

# SALES CLARITY ON A PAGE

Goals



Three white rectangular boxes for writing goals.



Our Key Selling Behaviours

Yellow sticky note

Yellow sticky note

Yellow sticky note



Our Sales Non-Negotiables

Red sticky note

Red sticky note

Red sticky note

Sales Effectiveness

Purple sticky note

Purple sticky note

Purple sticky note



Quarterly Priority

Light green sticky note

Top Target Sectors/Markets/Accounts

Light blue sticky note

Light blue sticky note



Our Learning Goals

Yellow sticky note

Yellow sticky note

## **Sales Goals;**

**Write out your Sales Goals. Remember write these as if you have already achieved them. For example I have achieved sales of €2,000,000 by the 31st December 20XX.**

## **Sales Behaviours;**

**What sales behaviours are you priority for the year? For example, upselling, cross-selling, new account development.**



## **Sales non-negotiables**

**Write down the new sales habits you intend to develop this year. Focus on High Impact selling activities that will generate the highest level of return on time and your personal energy.**

## **Sales Effectiveness**

**Identify the tasks that are limiting your time available to sell. What administration or work related tasks can you eliminate? What can you automate?**

## Sales Priority

What ONE PRIORITY should you focus on in the next 90 days?

## Learning Goals

Identify your areas for development. And, write below the specific learning goals you will adopt for this year.

# Final Step...

## Your goal narrative

### **Here is an example of a sales narrative.**

The overall goal of my sales plan is to build my territory to €4,000,000 sales by 31st December 20XX.

My sub-goal is to focus on clients with the ability to spend €100,000 annually.

That is 10 New clients spending €100,000 per year.

My second sub-goal is to up-sell 50% of my client base to our new product X range.

That is 60 existing clients listed with Product X range.

### **I will achieve this by**

- 1) Generating a sales pipeline value of €4,000,000 per quarter
- 2) Targeting 60 new prospect accounts every month. I will leverage, email, LinkedIn, referrals and telesales to target these accounts.
- 3) Presenting Product X to 120 existing clients.

### **Key Milestones**

Average 1 client per month from January to December

Average 10 presentations per month to existing clients for Product X

# Final Step...

## Your goal narrative

# Sales Coaching, Sales Training and Sales Consultancy

Never Generic. Always Tailored To You



One-off engagements

One-Off workshops and Programmes of workshops

One to three months engagement

Minimum six month engagement

<p><b>Single Session</b></p> <p>Behavioural Assessments We offer a full suite of DISC behavioural assessments. You will receive a comprehensive report. And a 60 - minute consultation.</p> <ul style="list-style-type: none"> <li>- Sales Skills Index</li> <li>- DISC behavioural assessment</li> <li>- Talent insights assessment</li> <li>- TriMetric DNA assessment</li> <li>- TriMetric EQ assessment</li> </ul> <p>( We can conduct assessments for teams as well).</p> <p><b>DISC ASSESSMENTS WITH ONE HOUR DEBRIEF €244 PLUS VAT</b></p>	<p><b>One and Two-Day Workshops</b></p> <ul style="list-style-type: none"> <li>- SalesCOACH training programme ( A minimum Two Full Days or 6 one-to-one sessions)</li> <li>- Sales Process Design</li> <li>- Sales Pipeline Management</li> <li>- Sales Prospecting</li> <li>- Sales Storyboard and Sales Presentation Skills</li> <li>- Sales Communication Skills</li> <li>- Sales Effectiveness</li> <li>- Sales Goal Setting</li> <li>- Listening And Deep Discovery</li> <li>- Close More Sales Deals</li> <li>- Handling Objections</li> </ul> <p><b>ONE DAY WORKSHOPS €950 PLUS VAT</b></p>	<p><b>Sales Infrastructure Diagnostics</b></p> <p>This is a two stage deep-dive analysis of your sales systems and processes.</p> <p>Stage One We will analyse your</p> <ul style="list-style-type: none"> <li>- Sales Strategy</li> <li>- Sales plans</li> <li>- Sales performance systems</li> <li>- Sales Processes</li> <li>- Sales Pipeline Management process</li> <li>- Sales tools</li> <li>- Selling tactics</li> <li>- Account management process</li> </ul> <p>Stage Two We will make detailed recommendations on how to improve your sales infrastructure.</p> <p><b>MONTHLY ENGAGEMENTS €2,500 PER MONTH PLUS VAT</b></p>	<p><b>Implementation And Management</b></p> <p>Here is where we excel. We become part of your team. And we work hands-on with you.</p> <ol style="list-style-type: none"> <li>1) We complete the Sales Infrastructure Diagnostic.</li> <li>2) Make recommendations.</li> <li>3) Then we move to execution phase.</li> </ol> <p>We will help you implement a full sales performance management system. Our PRESENT SOS.</p> <p>Including</p> <ul style="list-style-type: none"> <li>- Weekly sales reviews</li> <li>- One-To-One sales manager training</li> <li>- One-To-Group sales coaching and development</li> </ul> <p><b>MONTHLY ENGAGEMENTS €2,500 PER MONTH PLUS VAT</b></p>
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**Blended Learning - All programmes are reinforced with Video Tutorials and Exercises**

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