

10 ELEMENTS of a **SALES CALL PLAN**

End Ineffective Sales Calls



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TABLE OF CONTENTS

CALL PLANNER INTRODUCTION	p. 2
1. Logistics.	p. 7
2. Setting Expectations	p. 10
3. Sales Call Strategy	p. 13
4. People & Problems	p. 18
5. Objectives & Outcomes	p. 22
6. High Yield Questions.	p. 27
7. Collaboration	p. 31
8. Augmented Intelligence	p. 34
9. Mobile	p. 38
10. Cloud	p. 41
CONCLUSION	p. 45

CALL PLANNER

INTRODUCTION

So here's the thing about sales calls; there are really only two things that a salesperson controls:

1. **Who** they call on, and
2. **What** they say when they get there

Ideally a seller is spending as much time preparing for and executing on the **'what'** as he is deciding on the **'who'**. After all, no matter how well you have refined your target market, figured out the ideal buyer persona, and sharpened your competitive positioning, nothing happens until you engage with the customer.

But the research shows that very few of these engagements are planned. It is all too rare that a salesperson has a detailed plan of what he wants to achieve on the call.

what are the

DESIRED OUTCOMES?

why might

YOU FAIL?

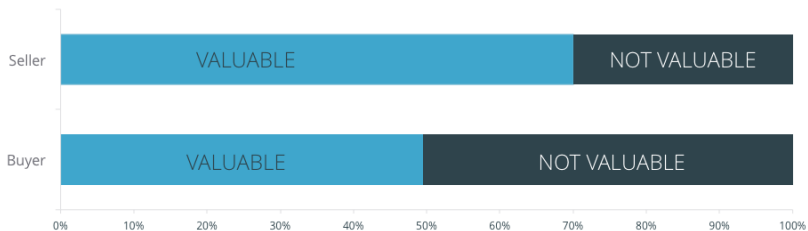
In the absence of a Call Plan, many sales interactions stumble, where they should stride. **In fact, 62% of all sales calls do not progress past the 1st meeting or call.**

The first call is where the magic is supposed to happen! It is the salesperson's opportunity to put the customer at the center, to deepen relationships, to uncover and address vulnerabilities in the deal and to progress the deal forward. It is his opportunity to show that he is a credible individual who can bring his own insight to the conversation and create — *not just communicate* — value, all the time advancing the deal.

Unfortunately, most of the time, there is no value created by the salesperson.

What % of meetings are valuable to the customer?

There is misalignment on sales value add



Source: Altify Buyer / Seller Value Index 2016

Buyers believe that only 49 percent of the meetings with sellers are valuable. This misconception of value can be easily overcome with two simple questions that each seller can ask themselves when they exit a meeting:

1. Where is the hard evidence that I actually made progress?
2. What did the buyer do or commit to do to show that we have advanced in the buying cycle?

The harsh truth is that from the buyer's perspective most sellers are not adequately prepared for sales calls. The consequences go further than you might think. If you waste executives' time — the most precious currency they have — your stock has fallen. The likelihood of progressing the sale has been damaged. Your value is questioned.

THE BUYER*

Smarter, more informed
Very busy, under pressure
Hungry for insight

Enlighten Me!

*All power lives here

THE SELLER

Struggle to sell solutions
60% don't add value to customer
62% meetings don't progress
50% miss quota
Ineffective sales coaching

Data, No Insight!

most sellers are
**NOT ADEQUATELY
PREPARED**

Other research suggests that **the purchase experience is the most significant arbiter of customer loyalty**. If your customer loyalty is damaged even before you start, you have a steep hill to climb if you ever want to use an executive to refer you to their colleagues. You have just wasted their time.

so, why would they subject their treasured relationships to an **INEFFECTIVE SALES CALL?**

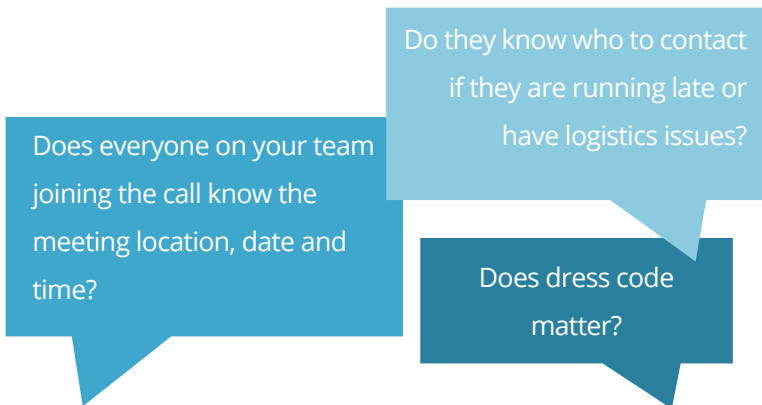
The more common scenario is where there are multiple people from the customer's side involved in the meeting, along with multiple people on your team — this is when the risk of the call going off the rails multiplies exponentially. If one person on your team under performs in a meeting, then that is a reflection on the entire team.

On the other hand, you could have a good, well-planned call that delivers on everything you wished for. Having a well thought out plan will help you and your team focus on making each event count, moving the decision in your favor. Without a plan there is an increased likelihood that some of the people on your team will inadvertently say and do things that create awkward situations that make the buyer uneasy. Having a game plan that outlines the desired outcomes and everyone's role on a sales call yields a stronger result.

ONE

LOGISTICS

This is the simple stuff that is important to get right. **Too many sales calls go wrong before they even start.** If you ever arrived late for a meeting, discovered too late that you needed security access to get in the building, or arrived at the customer's location assuming erroneously that your colleague brought the proposal — you know what I mean. You're instantly at a disadvantage. From the customer's perspective you have shown a disregard for their time. Immediately you have probably been relegated to the 62% of sales calls that don't succeed in moving to the next step. And that's before you even got started. So let's think about the simple things.



It is always better to err on the side of being over-dressed rather than under-dressed and finding the customer in business attire.

Make sure you have the audio-visual needs figured out and planned in advance. There is nothing worse than planning to do a presentation only to find that the meeting room is not equipped with a projector. Someone on the team should coordinate with the host of the meeting to make sure that you have the requisite technology, AV equipment, network access, whiteboards or flipcharts. You don't want to waste valuable meeting time on activities that don't help to achieve the purpose of the call.

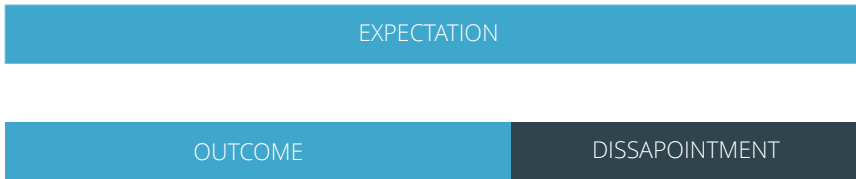
As you develop your call plan, make sure that it is clear who has responsibility for sorting out all of the logistics, and bringing whatever materials, product samples, or equipment you might require. Put these items on a list and if you are not doing it yourself then assign it to someone you can trust. Make sure that you plan early enough so that the pre-call activities can be completed without adding any stress for yourself or your customer.

“I thought you were
**BRINGING THE
PROJECTOR”**

TWO

SETTING EXPECTATIONS

William Shakespeare said, *“Expectations are the root of all heartache”* and that is really true when it comes to a customer meeting — both for you and for the customer. After every meeting, you always want each person in the meeting to feel that the meeting was a good use of their time, and they got more from the meeting than expected. **Satisfaction or quality is always a function of expectation and performance.** If you don’t perform to the customer’s expectations then they will be disappointed, and that’s not good. You, your colleagues and the customer should all be clear as to the expectation for the call. **A crisp, concise and clear meeting indicates an organized approach,** which creates a feeling of security in the buyer’s mind.



Why did the customer agree to the meeting? What is your meeting host expecting from you and your team? What would she like to accomplish as a result of the meeting? You want to make sure that expectations are aligned. You want to avoid having the customer expect to see a final presentation if you expect further discussion about their business requirements. Knowing their expectations allows your team to appear focused on the buyer’s needs rather than on getting your point across and to earn the right to advance.

The simplest way to achieve this is to agree upon the agenda in advance, being clear on the best possible outcome for both you and the customer. What really works well for me is if I can collaborate with someone in the customer's organization on the agenda. Then I can distribute the agreed-upon agenda so that everyone is on the same page.

We suggest that the agenda that you give the customer address the outcomes for the meeting from the customer's perspective. This is courteous, but also gives the customer the opportunity to:

1. Alert you if the agenda does not meet their objectives
2. Provide input into the agenda if they want to discuss additional topics
3. Confirm the meeting is still taking place
4. Suggest other attendees who might make the meeting more productive

Make sure that when you are crafting the agenda that you have allocated sufficient time to get to your core meeting objectives. Don't get into a situation where you have run down the clock only to find that you have missed the opportunity to uncover information you need, ask the customer to take a specific action to progress, or teach the customer something that you want them to learn.

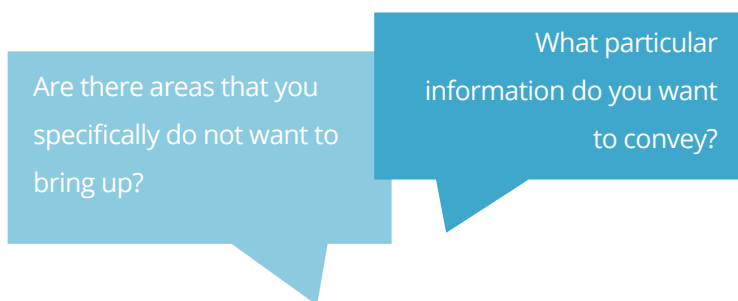
THREE

SALES CALL STRATEGY

Consistent execution means that you consistently remind yourself and your team of your strategy to win. By consistently linking the strategy to the actions, all the sellers in the meeting will know which activities will support the strategy. **If, for example, you have selected a flanking strategy to compete, you know you need to change the rules of engagement.**

Early in the buying process, your call plan might focus on identifying the current rules as well as what messages you can send to change the rules.

Every sales call presents you with an opportunity to learn more about the customer's journey, so that you can determine how you can help. **Your job is to guide them along a path of mutual value** so that as you deliver value to the customer you arrive together at your preferred destination. **They choose to buy from you.** The best way to sell effectively in a flanking situation (for example) is to demonstrate value to your customer in an area they had not considered. With your team, you need to be clear as to the unique value that you can bring, and how you propose to communicate that during the meeting.



In order to **get the most from your team on a sales call**, you need to be crystal clear on the information you would like to communicate on the call. Unless the key messages are discussed and agreed to before the call, including who should say what, when and to whom, your meeting is unlikely to be successful. After the meeting you may find yourself saying “I thought you were going to bring up how we helped ABC Company solve the exact same problem,” only to hear “No, I was sure that you had that covered.” You will also want to be prepared for a situation in which an opportunity arises to present or acquire information; you need to be clear as to who has responsibility to grab that opportunity.

Equally important is to document **what should NOT be talked about** in the meeting. For instance, when the customer wants to discuss the price of your solution, you may not be ready to have that conversation. If that is the case, but you have not informed your team of your desired approach, then you may well have trouble on your hands. This happens with other topics as well.

It is always better to have figured out in advance how to deal with these kinds of issues in case the customer brings them up. I have never been in trouble for ‘too much’ preparation or over-communicating the “should not” topics with my team.

strat . e . gy [noun]

a plan of action or method to achieve a goal

COMPETITIVE CONSIDERATIONS

There is almost always some competitive aspect to consider when on a sales call. Your customer always has options. They could buy from a competitor, decide to do nothing, or they could buy from you. As part of the sales call plan you should consider how you want the customer to think about the competitive considerations. You can do that by getting your customer to understand the value of a specific capability that you know is a weak area for your competitor.

For example, we believe that having built our Altify solutions on the Salesforce platform is a tremendous advantage to our customers, but they don't always think about that. So, we might ask the customer how important it is for them to have a secure, robust, high-performing application, and highlight the fact that Altify is built on Salesforce, so that they don't have to worry about the considerable security issues or performance risks of having a solution in a third party cloud. If reliability and security is truly important to our customers then it makes it very difficult for many of our competitors to compete.

your customer
**ALWAYS
HAS OPTIONS**

We also know that many companies fail to gain the return from their sales effectiveness investment because it is difficult for the salespeople to use the methodologies that they have been taught. Altify solves that problem through the combination of deep sales methodology and insightful software delivered in the cloud and on mobile devices. Salespeople can learn and apply concepts directly from their smartphones.

We learned that this is really important to our customers when we asked a very simple question: “What happens when the sales trainer leaves?” This question, when presented to seasoned sales executives, is usually greeted with a slumping of the shoulders, a slow but considerable intake of breath, accompanied by an honest “Yep, that’s really a hard problem to solve” response.

Because we solve that problem (and it is a real problem for our customers) more effectively than anyone else, we consistently ask that question of prospects. It highlights an important consideration for them and sets the bar high for our competitors.

FOUR

PEOPLE & PROBLEMS

You'd be forgiven for thinking that being a customer is easier than being a salesperson. All the customer has to do is pick a supplier, right? But when the customer makes that buying decision, we now know that the risk shifts from the supplier to the customer, and the impact on the customer of a poor buying decision is usually greater than the impact on the salesperson of a lost sale. I have said this before, but I think it is important enough to say again:

The impact on the customer of a poor buying decision is usually greater than the impact on the salesperson of a lost sale

For a customer to be comfortable, she must be absolutely certain that the supplier has a deep comprehension of her (sometimes unstated) needs. Buyers don't always understand their own needs. When that understanding is filtered through the lens of another, vision is often blurred, and the picture that emerges is uncertain.

You must always bring that perspective with you to the sales call. Your sales call must be focused on the customer's business issues.

What are her goals?

What internal or external pressures are causing her to act?

What initiatives is she considering to address those issues?

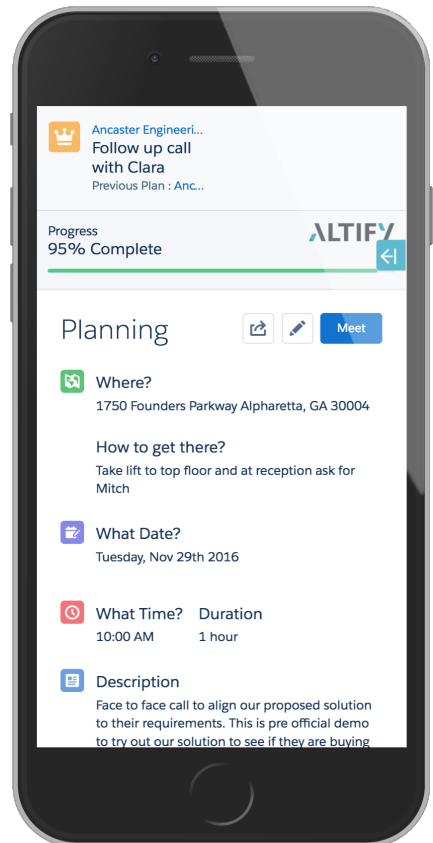
As I have worked with talented sales professionals around the world, failing to access Key Players, or to influence them effectively, is always one of the most frequent reasons cited for failure in a sales campaign.

How many times have you, or one of your sales team, spent weeks on a sales campaign only to learn that one of the Key Players that you did not connect with had sent the sale in another direction?

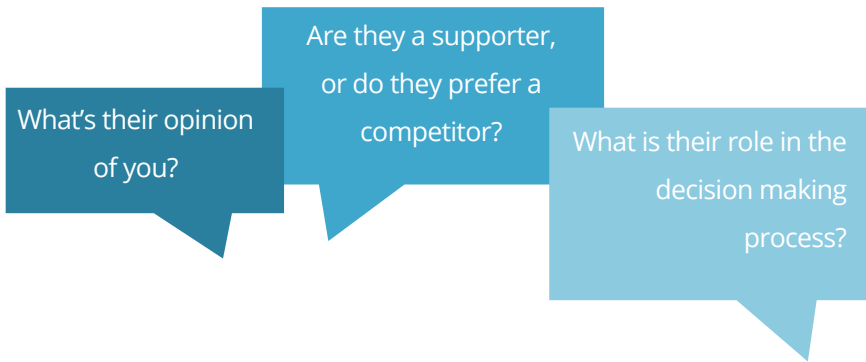
You're not alone. According to our research, we know that those who are competent in this area achieve 30% greater quota attainment than those who don't.

Most deals are not lost because you don't have the best solution or the best price or the best terms and conditions.

deals are usually lost
because you
DID NOT
UNDERSTAND
the people or the
problem



Your sales call is an opportunity to understand clearly what your customer wants to achieve. When you head into that meeting, you want to consider what you already know about each person on the other side of the table. What's their opinion of you? Are they a supporter, or have they a preference for one of your competitors? What is their role in the decision making process?



Each person in a buying role merits a separate selling approach, and you should be clear about who on your team is responsible for executing on the tactics supporting that approach.

When you get to setting objectives, determining information that you want to convey, crafting your high yield questions, or articulating your competitive positioning, you will always need to do this in the context of the people and the problems.

FIVE

OBJECTIVES & OUTCOMES

Setting objectives for the call is the most important thing to do. Once you know who will attend the meeting and the business issues they care about, you can begin to consider your objectives for the call.

It is useful to ask yourself the question, “What evidence am I looking for to know that I have advanced the sale?” Coming out of a call feeling that it went well is of little value if you can’t point to specific actions the customer has taken or has agreed to take as a consequence of your interactions in the meeting.

what do you want to **ACHIEVE** in the meeting?

To create objectives, you should brainstorm with your team to figure out the optimal outcome from the call. This should be a stretch goal — not too easy “What can I achieve if I really push and everything goes well?” Then spend the time to work out what you might need to do to achieve that outcome. Consider the creation of your objectives as a mini deal review, and an opportunity to assess your current position and figure out your go-forward plan.

Objectives need to be S.M.A.R.T. (Specific, Measurable, Achievable, Relevant and Time-bound). Objectives shouldn’t be vague or ambiguous.

In setting outcomes, **sales teams often fail to set aggressive goals**

Instead, they settle for information that anyone could get:

- Gather information about the buyer's business
- Confirm the buyer's goals
- Confirm the buyer's timeframe

Other examples of poor objectives might be:

- Advance the relationship
- Make progress in the sale
- Demo the software
- Help them understand our value

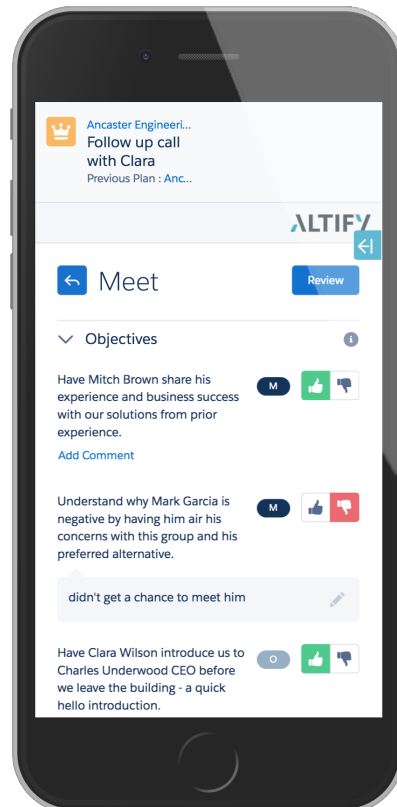
For each objective you should be clear as to why it is worth pursuing and what action/statement you want from the customer that will prove you have been successful in achieving it.

Better objectives might look like this:

1. Have Pat Morello, the business sponsor, verbally confirm that we understand their requirements
2. Work through the cost of their production inefficiencies today to get Helen Hastings, from the finance committee, to describe the daily cost of inaction
3. Have Mitch Boyle confirm the business pressure that underlines the fact that security and performance are key decision criteria

4. Get agreement from Pat Morello to a Phase 1 deployment to validate that our solution is a good fit for their requirements
5. Gain greater internal alignment by moving Mitch from Neutral to Supporter. He confirms that he will sponsor us to begin supplier setup

You won't always achieve your optimal objectives, so there is always value in considering a minimal objective. A minimal objective should be the least thing you need to happen on a call to advance the opportunity and make the event worth the time and effort you are investing. In the list above, you might consider objectives 1, 2 and 3 as minimal objectives, and 4 and 5 as optimal objectives.



OBSTACLES TO SUCCESS

“If I had only thought about that before!” is one of the most frustrating personal reprimands — so it is always better to try to avoid it. As you develop your objectives for your meeting you should also consider why you might fail to achieve them. Thinking through the various scenarios will focus your mind and help you create better action plans to succeed.

For each of your planned objectives, ask yourself, “What might prevent me from achieving this objective, or not getting the outcomes I need?” Then build your plan to overcome these barriers.

what could
PREVENT ME FROM
ACHIEVING this objective?

SIX

High Yield Questions

High yield questions are those that uncover the greatest amount of information using the fewest questions. Example: You want to learn more about the customer's perspective on their competitiveness. You might want to know the answers to the following:

1. Who are your largest competitors?
2. How do their solutions stack up to yours?
3. How does their market share compare to yours?
4. Do they have a strong sales organization?
5. What are they doing that is effective?
6. How are you beating them?

Instead of asking a stream of six questions, let the customer lead you by asking a high yield question like **“What are the things that are uppermost in your mind relative to your competitive environment?”** This question gives the seller the opportunity to gain insight into the customer's perceptions and it also provides the buyer with the opportunity to answer the six questions in one go. The customer is leading the conversation (not you) and with this approach you have much greater opportunity to learn surprising facts that you might not have considered.

uncover the greatest amount of
INFORMATION using the
FEWEST QUESTIONS

elevate your customer's **PERCEPTION OF YOU**

When you prepare and ask high yield questions you get better answers. Well-structured questions, founded in meaningful relevant insight, will elevate your customer's perception of you and increase your credibility, while at the same time eliciting more valuable information.

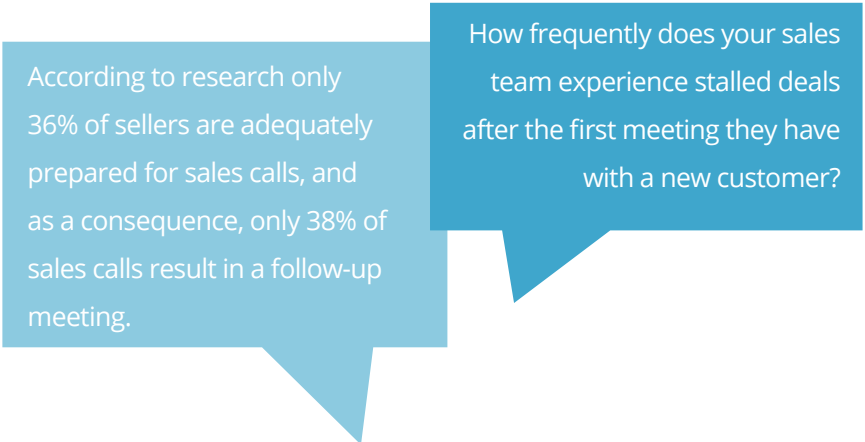
Here's how you might think about structuring these questions.

1. **What specific information do you need** in order to move forward effectively? You will want to consider the elements of the answer you are seeking so that your question can be structured to dissuade vague or ambiguous answers. Obviously you will not know the answer itself, but you can identify the type of information you're seeking. It may be specific metrics, the names or titles of people involved, the impact of a particular problem, the individual's perception of the most important challenges they face, etc.

2. Next you need to determine **who can provide that information**. If that person is not in the meeting, you might want to ask someone who will be there to get the information beforehand so that you can ask the question in the meeting so that everyone hears the answer.

3. Then you structure the question itself. Start with an insight or unarguable fact that sets the context for the question, and follow that with your question.

For example, I might say:



According to research only 36% of sellers are adequately prepared for sales calls, and as a consequence, only 38% of sales calls result in a follow-up meeting.

How frequently does your sales team experience stalled deals after the first meeting they have with a new customer?

You only have so much time on the sales call, and for the most part you want the customer to be doing most of the talking, so the question you ask needs to be planned and deliberately designed to give the optimum yield.

SEVEN

Collaboration

With sales organizations becoming increasingly fragmented, often split between inside and field reps, dispersed between home offices, corporate locations and on the road, **it can be difficult for sales teams to effectively work together or interact efficiently**. But enterprise selling is a team sport. Everyone needs to know what is going on all of the time to be most effective.

When preparing for a sales call the difference between success and failure can sometimes be your ability to get everyone on the same page. Real-time communication is critical. Without it you might miss the opportunity to advance the deal, run into problems that, with better alignment, you might have avoided, or look foolish in front of your customer. But it doesn't have to be that way.

timely collaboration

REDUCES SALES LATENCY and
DRIVES PRODUCTIVITY

If you are using a cloud-based CRM, such as Salesforce, mobile-enabled with Salesforce1, then there really are no excuses anymore. By having a collaborative application integrated with Salesforce, all information is **available to everyone at the same time** so that there is **no loss of productivity**. Team members get to participate and enrich your Call Plan throughout the lifecycle of a Call.

With tools such as Salesforce, Altify's Call Planner and smartphones, you can drive productivity across a sales organization and reduce delays in all areas by creating an informed and connected sales team. A collaborative culture supported by the requisite smart technology offers the ability to optimize your sales processes and communications, integrate multiple information channels and data sources with the people on your team so that everyone is prepared for the call.

As we navigate **the confluence of mobile and cloud**, we predict that the uptake of such collaborative smart sales systems will surge as applications and tools are introduced that make it easy for the sellers to plan and execute their sales call from any desktop or mobile device, inside or outside the office. The speed, flexibility and the cost and time effectiveness of such collaboration sessions will make them standard. **If you are not leveraging these advancements you will be at a disadvantage** against your competitors who inevitably will be prepared.

EIGHT

AUGMENTED INTELLIGENCE

As a salesperson, when you are going on a sales call, you know that knowledge is valuable. But as you seek to outpace your competitors, anticipate customer needs, and make quick informed decisions, sometimes knowledge isn't enough; it is what you do with it that matters. The most progressive sales organizations are applying augmented intelligence sales systems to enhance the seller's knowledge and insight when making a call.

Here's how we think about augmented intelligence (AI)

AI = Data + Knowledge + Context + Insights

When you visit a customer, there is data that you have about the opportunity or the account. To have a successful sales call you should apply the knowledge that you have learned over the years as you prepare for the call and to guide your execution while you are there. But as you know, **you must apply the knowledge in context**. Different scenarios will benefit from different knowledge, and whether you know it or not, you use insight to apply the data, knowledge and context, to make judgments about what to do next. You have a much greater chance of preparing well and executing effectively on the sales call if you leverage technology to prepare your sales call plan, inform your actions and help you make better judgments.

it's what you do with the
KNOWLEDGE that matters

Our Augmented Intelligence Journey

We began pioneering the notion of 'smart selling' back in 2005. Traditional sales training companies have disagreed with the notion saying, "You can't automate selling" — which is true, in an absolute sense — and ignored or cast aside the potential value that technology can bring to automate some of the repetitive tasks or analytical tasks that today's sales professional must deal with. Saying you can't automate sales is like saying you can't automate financial trading, construction design, or medical diagnosis. Yet investment analysts, engineers and doctors rely on augmented intelligence systems every day to guide best practice, shape decisions and predict outcomes — employing the rigor of technology to the repetitive and analytical tasks, to free themselves to apply the art of their craft, gleaned from experience.

If it usually takes you 120 days to close a \$100,000 deal, or 14 days to get a contract signed, then it might be helpful if the software — knowing where you are in the sales cycle — could indicate when you might expect to book the deal, based on the usual pattern of behavior. At least you know and you can plan your sales call accordingly.

Effective account planning can deliver remarkable revenue growth in your large enterprise accounts. By their very nature, large accounts are complex entities, so when meeting with your customer it can be hard to know where to focus. You need to plan this call, just like any other sales call. An augmented intelligence enhanced call plan can guide your conversation in the direction of mutual value. If one of the buyers in the meeting values a particular feature that your competitor offers, then you know that your competitive strategy should account for that.

When you consider all of the opportunities that you work at any given time, it would not be unusual to sometimes overlook this vulnerability.

If you don't address that risk when you have the customer's attention during your sales call, you are missing out. An augmented intelligence sales system is less likely to make that mistake and will highlight for you the risk to your deal so that you could respond appropriately.

You can't automate the execution of a sales call any more than you would trust a computer to fully diagnose your ailment, decide the strategy for your investment portfolio or choose the materials for a new bridge spanning San Francisco Bay; but it seems to me that you would be foolish not to automate what you can in preparing your sales call plan, leveraging the data, knowledge, and context to make way for you to apply your skills and expertise when you are in front of the customer.

An augmented intelligence sales system will perform more consistently, more quickly and with less effort than any of us who from time to time suffer from imperfection, tiredness, forgetfulness, subjectivity, illness, a busy schedule, over- confidence or frustration.

Progressive sales professionals today are using augmented intelligence software to prepare for calls, to consistently apply rules and quantitative analysis so that they can be reasoned and flexible, to discover, imagine and learn, and after all that, to apply judgment.

NINE

Mobile

Think about this. If there are two people in the room — you and your competitor— and you are not leveraging mobile technology, then who has the competitive advantage?

The facts are pretty amazing. The mobile industry has scaled dramatically over the last decade. At the end of 2015, there were 7.1 billion global mobile subscribers in the world, with 3.3 billion smartphones being used. That's a lot of people with a mobile, and almost half the global population using a smartphone. If it's going to be you or them, then it may as well be you.

So mobile is not an option anymore. Salespeople live on their phones. Sales calls typically happen “on the road” and the phone is the device that we all choose to use. You are missing a great opportunity if you can't use your sales call plans on the phone. As you go from call to call, you need to switch context quickly. You need to re-orient yourself from one call to the other so that you are consistently effective, reminding yourself who will be at the meeting, what they care about, the key messages to focus on, information you need to gather, etc. You are working many deals, working with many customers and internal resources. The mobile call plan puts you at ease.

The smartphone has become an extension of the salesperson's armory. It is usually the first thing they check when the plane lands. It is the last thing they check before they walk into a meeting and the first thing they check when they walk out.

Time is precious, and the salesperson's time is incredibly precious, both to them and to the sales organization looking to maximize the performance of their key quota-bearers.

Since so much of a salesperson's time is spent moving between A and B and back again, they should be equipped with the mobility to connect to their sales call plan, allowing them to be responsive, productive, collaborative and consistent at any time, wherever they are. Given that many sales call are conducted on the road it makes total sense that the salesperson can access his call plan directly from his phone.

EXTENSION OF the salesperson's **ARMORY**

TEN

Cloud

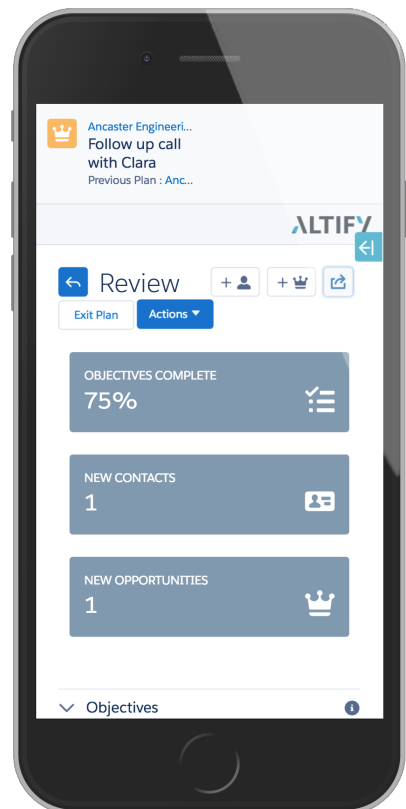
As twin engines of growth, the inexorable rise of mobile device ownership as referenced in the previous section, and the advancement of cloud computing are the most significant changes in the business landscape that any of us has witnessed in our lifetimes. According to Gartner, the total size of the cloud computing industry in 2016 is estimated to be \$204 billion as compared to \$175 billion in 2015, and the overall cloud computing growth rate is 5 times more than the IT growth rate globally. This shift is empowering for salespeople on the road. For business strategists, marketers, sellers and buyers alike, mobile and cloud are becoming the twin axes around which business revolves — and your sales call plan needs to benefit from the tremendous advantages they can bring. When your sales call plan is hosted in the cloud your team can collaborate more easily and integrate more seamlessly with other cloud based applications.

Apps on your mobile device are at the end of the spokes attached to the hub in the cloud. For sellers on the road preparing for a sales call, collaborative access to the information at the hub is invaluable.

According to Forbes, by 2018, 62% of CRM software will be cloud-based.

Let's say you use Salesforce as your CRM, and Altify Call Planner (or another cloud based application) as your call planning system. If that is the case, you are already asking your sales team to enter their opportunity information into Salesforce and your call plan can be informed by information from your opportunity management system.

If that is where your opportunity detail is held, and where you have used Altify to create a Relationship Map for the opportunity, or built out an Insight Map for your customer, then you must leverage that information in your sales call plan. That's how you make your call plan smart. It must integrate tightly with the CRM system and your sales performance automation system so that if information changes about the people or their business strategy, then the call plan should automatically "know".



If you are on Salesforce, then your call planning solution will greatly benefit if it is “native” on the Salesforce Platform.

Unlike other solutions that are just linked to Salesforce, or just lightly integrated, this means that your data resides in the Salesforce Cloud, with the same security as Salesforce, the same performance as Salesforce and will work the same way as your other Salesforce apps. You do not have to worry about the security of a third party cloud, the data transfer issues that occur with non-native solutions, or the reliability of a third party hosting infrastructure. In addition to being smarter because it is integrated to everything else that you know about the opportunity and the customer, the app itself will be more familiar to use, more secure, more responsive and more available, than if it is not built natively on the Salesforce Platform.

Familiar | Secure | Responsive

CONCLUSION

BECAUSE IT'S WORTH IT

So let's say you've taken to heart all the recommendations in this book.

Is it all worth it?

If you invest the time to make sure the logistics are perfect, agree on expectations with the customer, collaborate with your team on call strategy, plan the questions to ask and the objectives of the call, how do you know it is worth the effort?

We are not going to trot out the 'Failing to plan is planning to fail' cliché because we know you know that is true. But we also know that when you have more effective sales calls you win more often. **The trick is in knowing what you can influence and what to measure.**

There are only four factors that impact your sales velocity:

$$\begin{array}{c}
 \text{SALES VELOCITY} \\
 V = \frac{\begin{array}{ccc} \text{OPPORTUNITIES} & \text{DEAL VALUE} & \text{WIN RATE} \\ \# & \times \$ & \times \% \end{array}}{\begin{array}{c} L \\ \text{LENGTH OF SALES CYCLE} \end{array}}
 \end{array}$$

Simply put: you want to increase #, \$ and %, and reduce L.

For example, if you increase #, \$ and % by 10% and reduce L by 10%, then you increase your sales velocity by 47%... Go on, do the math — it works out.

$$\begin{array}{c}
 \text{+10\%} \quad \text{+10\%} \quad \text{+10\%} \\
 \text{OPPORTUNITIES} \quad \text{DEAL VALUE} \quad \text{WIN RATE} \\
 \text{V} = \frac{\text{\#} \times \text{\$} \times \%}{\text{L}} \\
 \text{SALES VELOCITY} \quad \text{-10\%} \\
 \text{+47\%} \quad \text{LENGTH OF SALES CYCLE}
 \end{array}$$

Unfortunately most people focus **most of their time on getting more opportunities** and not on trying to maximize the return from the opportunities they have. Adding to the pipeline is important, of course — but only if you win a good proportion of the deals. Smarter sales call plans can help.

Let's consider what might happen if you apply the *10 Elements of a Sales Call Plan* to your current opportunities. **What happens if you don't add new opportunities, but execute effectively on the sales calls for your current opportunities?**

Sales Velocity Levers	Which Elements to Apply
Number of Deals	No change
Sales Cycle	Logistics, Expectations, Collaboration, Mobile & Cloud, Integrated
Win Rate	Smart, Strategy, Objectives and Outcomes
Average Deal Size	People and Problems, High Yield Questions

If we apply the sales velocity equation and assume that the number of opportunities stays static, but that you do manage to increase the average deal size and win rate by 10%, and reduce the length of the sales cycle by 10%, your sales velocity would improve by 34%. That's one third more revenue from the same number of opportunities. Seems like it is worth it.

So, this quarter you might want to take up this challenge. Apply the *10 Elements of a Sales Call Plan* for every sales call you have. You might be surprised at the results.

ABOUT THE AUTHOR



Donal Daly is CEO and founder of Altify, which is his fifth global business enterprise. Combining his expertise in enterprise software applications, artificial intelligence and sales methodology, he continues to revolutionize the sales effectiveness industry. Donal was also CEO and founder at Software Development Tools, NewWorld Commerce, The Customer Respect Group, and Select Strategies — all of which were acquired by various parties. Donal is the author of four books including his recent Amazon Best-sellers, *Account Planning in Salesforce*, and *Tomorrow | Today - How AI impacts how we work, live and think*.

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