

Sales Accelerator Planning Tool kit

<http://www.grahamhelps.com>

Introduction

This toolkit is intended as a very practical and useful tool in driving an increase in individual, team and company sales performance and productivity. It is provided without too much explanation, as it should be fairly straight forward to understand, but please email me with any questions: contact@grahamhelps.com

There are three parts:

1. Sales productivity analysis
2. Opportunity qualification
3. Annual sales plan

Pipeline management

I recommend the use of an online lead tracking or pipeline management system. After many years of trying different software programs in a number of organisations, there is only one that I would recommend – **Pipeline Deals**. Quite simply, it works better than any other program in helping maximise your sales productivity.

Plus, at only \$15 per user per month it is one of the cheapest.

For more information – [click here](#)

This PDF version is also available free of charge in a Word format upon request.

Whilst not all forms or templates will exactly appropriate to every type of sales situation, the principles will still apply. Please feel free to make any changes as you wish and let me know any ideas for inclusion.

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Growing sales with new business

Average order value

1. **Conversion ratio** of proposals to orders (sales or new sales)
2. **Number of proposals** (ideally to new prospective customers) sent out
(and underpinning activity, although this is more important for individual sales people and their managers.)

Consider the following example:

Average order value	Conversion ratio	Number of proposals
1, 000	4:1 (4 proposals to 1 order	4 per month

Resulting sales = £1,000

If we could achieve an approximate 10% increase in each of these:

Average order value	Conversion ratio	Number of proposals
1, 100	3.5:1 (3.5 proposals to 1 order	4.5 per month

New sales = £1,430 (4.5 divided by 3.5 = 1.3, 1.3 x 11,000 = 14,300)

It is exactly these three metrics that this sales productivity tool kit addresses.

Sales productivity analysis – overview of forms

Benefits

The three main gains anticipated over time are:

- improved conversion of 0-60 day opportunity and cancels pipeline to sales and saves
- improved average sales per sales person and customer
- increased prospecting and general sales activity leading to higher value of well qualified 0-60 opportunities

Information gathered	Frequency
Sales productivity analysis One page form	Completed weekly Summary information sent to sales managers and directors.
Qualification checklist (0-60 days) One page, plus copy of proposal (mandatory)*	All opportunities (sales and cancels) must have proposal Updated monthly or for significant changes.
Annual sales plan Three pages – summary plus list of prospects/customers	Start of year, updated and reviewed quarterly

Managing sales productivity

This form will analyse

1. Total sales for last period
2. Conversion ratio 1: 90+ to 30 day qualified opportunities
3. Conversion ratio 2: 30 day to closed business
4. Average order value
5. Number of first appointments
6. Total number of sales calls (including above)

The worked example is shown by quarters, but the template also works and is easier done on a weekly basis.

Information needed

1. Total value of closing pipeline (proposals sent) during period (A) (see note)
2. Total sales at end of period (B)
3. Number of first appointments (C)
4. Total number of sales calls (including above) (D)
5. Number of individual sales order taken (E)

The following analysis can then be completed and tracked over time:

Conversion percentage ($B/A \times 100$)

- Average order value (B/E)
- Activity ratio ($E/D \times 100$)
- Prospecting activity ratio ($C/D \times 100$)

Sales productivity analysis

	Q1	Q2	Q3	Q4	Year total
Total value of closing pipeline (proposals sent) during period (A) (see note)					
Total sales at end of period (B)					
Number of first appointments new contacts(C)					
Total number of sales calls (including above) (D)					
Number of individual sales order taken (E)					
Conversion percentage (B/A*100)					
Average order value (B/E)					
Activity ratio (E/D*100)					
Prospecting activity ratio (C/D*100)					

Tip: complete five rows A-E, validate by financial reports and diary printouts log.

Pipeline – this is calculated by adding together the value or all proposals and price quotes sent out during the period. The lag at the beginning/end should cancel each other out.

Sales productivity analysis – weekly

	W1	W2	W3	W4/5	Monthly total
Total value of closing pipeline (proposals sent) during period (A) (see note)					
Total sales at end of period (B)					
Number of first appointments new contacts(C)					
Total number of sales appointments (including above) (D)					
Number of individual sales order taken (E)					
Conversion percentage (B/A*100)					
Average order value (B/E)					
Activity ratio (E/D*100)					
Prospecting activity ratio (C/D*100)					

Tip: complete five rows A-E, validate by financial reports and diary printouts log.

Pipeline – this is calculated by adding together the value or all proposals and price quotes sent out during the period. The lag at the beginning/end should cancel each other out.

Opportunity qualification

For all opportunities that you expect to be closed within 30-60 days, the following must have been done for this to be considered a valid and real opportunity, **otherwise it cannot be included in the 0-30 pipeline/pledge figures.**

- Budget / price discussed with the customer
- Simple project plan presented in writing
- At least three significant improvements or benefits of your solution have been presented/proven to **both** the users and the business? (either via demo or user test, etc)
- Written proposal submitted, not just a price quote
- Customer has been given a sample order form/T&C's to review
- Final (closing) objections uncovered, isolated or dealt with
- Know the customer's next step

Use the **opportunity review worksheet (1 & 2)** and **closing worksheet** (see over). The purpose of using the worksheets is to ensure:

1. Accurate and objective review of all opportunities
2. Identification of clear actions and next steps for each opportunity
3. Structure for future progress reviews and management assistance

90 day pipeline review

This should accurately establish:

- Potential for opportunity – min and max
- Stage of customer's buying process
- % chance of winning – with supporting logic
- Clear next steps

Opportunity review / 1

Opportunity / customer		
Money	Budget / price /order process discussed with customer? Price differentiation discussed? Contact value-price confidence	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> yes <input type="checkbox"/> no low 1-----5-----10 high
Authority	Key influencers specified - how many have we met? Do we have an advocate in the customer? How much influence do they have? (scale 1-10) Economic buyer identified and contacted/consulted	_____ <input type="checkbox"/> yes <input type="checkbox"/> no 1-----5-----10 <input type="checkbox"/> yes <input type="checkbox"/> no
Timescales	Time for decision known Expectations managed/checked internally for quote	<input type="checkbox"/> yes <input type="checkbox"/> no _____
Competition	Do we know our main competition? Level of satisfaction with alternatives What is the likelihood they will stay with what they have / do nothing? Is there enough urgency to make a decision? What is the willingness to change? Perception of risk in changing / taking new policy	<input type="checkbox"/> yes <input type="checkbox"/> no Who _____ low 1-----5-----10 high stay 1-----5-----10 go not 1-----5-----10 keen <input type="checkbox"/> yes <input type="checkbox"/> no stay 1-----5-----10 go low 1-----5-----10 high
Hot- buttons	Have we presented or listed at least three significant improvements, advantages or benefits of your product or solution? Are they important enough to the customer? Have we 'proved' these? Does the customer advocate / believe them? Have we submitted a written proposal and order form? If not when? How well does your product or solution match the customer's needs? Senior management contact? Main hot buttons	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> yes <input type="checkbox"/> no: how _____ <input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> yes <input type="checkbox"/> no low 1-----5-----10 high <input type="checkbox"/> yes <input type="checkbox"/> no _____

Opportunity review / 2 - notes

Customer/Opportunity:		
Date	Notes	Agreed actions

Closing worksheet

Client name	
Opportunity description	
Approx. value (min – max)	
Date of decision expected	
Date of last contact	
What is your biggest single obstacle in closing this business?	
What would have to happen to remove this obstacle?	
Now identify actions that you can take to move this opportunity closer to a successful win:	

90 day pipeline review

Client name and opportunity	Potential for opportunity – min and max	Stage of customer's buying process	% chance	Next steps

Quarterly / annual sales plan

The annual sales plan, updated quarterly, is the foundation of a your planning.

Please read through worked example before completing your personal summary.

The plan will probably have to been done several times as you gain more information target clients and prospects.

The three components are:

1. Summary sheet
2. Target client list
3. Target Prospect list

Annual sales plan summary – worked example

	Year total	Target 1	Target 2	Target 3	Target 4
Target value	100, 000	20k	40k	30k	10k
Average order value		3	2.5	5	1
Therefore, number of orders required to hit target		7	16	6	10
Percentage of sales from existing clients (upgrades/renewals/etc) List separately		80	10	50	70
Percentage of sales from new clients List separately-		20%	90%	50%	30%

Monthly planned activity summary

Average target deals per month (X)	Number of orders	7 / 12 = .6	16/12 = 1.3	6/12 = .5	10/12 = .8
Average proposals to send per month (Y) (See notes below)	(2-5 times figure X above)	X 2 = 1.2	X 4 = 5.2	X 4 = 2	X 3 = 2.4
Average number of sales appointments/meetings per month (Z) (rounded up)	(2-5 times Y figure above)	X 3 = 4	X 3 = 16	X 3 = 6	X 3 = 8
Average number of prospecting telephone calls per month (CC)	(2-5 times Z figure above)	X 5 = 20	X 5 = 80	X 5 = 30	X 5 = 40

Therefore total weekly target activity level: Appointments: 9 Prospecting calls: 43

Notes: conversion of proposals to deals varies based on product type and whether new or existing clients

Annual sales plan summary

	Year total	Product 1	Product 2	Product 3	Product 4
Target value					
Average order value					
Therefore, number of orders required to hit target					
Percentage of sales from existing clients (upgrades/renewals/etc) List separately					
Percentage of sales from new clients List separately-					

Monthly planned activity summary

Average target deals per month (X)	Number of orders				
Average proposals to send per month (Y)	(2-5 times figure X above)				
Average number of sales appointments/meetings per month (Z)	(2-5 times Y figure above)				
Average number of prospecting telephone calls per month (CC)	(2-5 times Z figure above)				

Notes: Year total - then divided into main 'product' areas. Product could refer to segment, product, solution, etc.
 Target client list should be 3-5 times number of orders required to allow for conversion %

Annual sales plan – target new sales from EXISTING clients

Target existing known clients	When	Approx value	Notes

Continue on sep. sheet.

Annual sales plan – target NEW prospect list

Target NEW prospect if known	When	Approx value	Notes

Continue on sep. sheet.