Adjusting Plans

The VP of Sales stood in front of the sales organization and with the president in the audience announced that this was a critical quarter. The management team needed a very good handle on sales activity and the forecast for the quarter. When asked why the CRM system was not providing the right information, the VP said that was another discussion. He later admitted that not everyone enters their data. I said, because it is a chore and brings little value to the rep. "We have a new form, just eleven pages with key information requirements to be filled-out and returned in five days for each of your accounts."

We dutifully performed the task, but no mention was ever made of the use of the gathered information. Was that situation unique requiring special forms at the end of a quarter to better understand "what was really going on"? Was the CRM system not good enough or just not enough? Is the forecast-development process flawed?

We know plans for selling must be flexible. Some think, "better yet, the ultimate flexibility is not to plan, just stay flexible." Under these circumstances the rep dare not publish his/her thinking in a plan. The candidate activities are driven by the status of any campaign, which is dynamic. It's a competitive roller-coaster ride that will make a liar out of even the best reps within hours of disclosing any plan. So good reps offer the next few steps as sufficient planning to satisfy any requestor and then ignore part or all of the stated objectives as conditions change. In other words, they stay flexible; they keep their campaign futures in their heads, right next to hope, right next to imagination.

The days of sales professionals operating individually are gone, replaced by teams of shared specialists spread among several reps, geographic territories and industries. How are they kept abreast of developments in a campaign? Emails, review activities in the CRM system, meet the night before at dinner and discuss the prior significant events and current prospect sentiments? Does that specialist have time to be useful, to recommend any adjustment to the proceedings? Could those resource specialists impact the rep's planning and in doing so affect the rep's forecasting accuracy or execution efficiency?

As a resource manager the rep must coordinate precious support services after some effort to enlist them. To be effective each resource needs to be briefed as to the history of the account, what their particular role is and what the expectations are. Many companies use a form to garner support resources including executive participation. And many companies use another form at specific points in the sales cycle to inform the participating resources as to the campaign background, company strategic goals, key executives names and dispositions towards the project and vendors, recent history, competitive issues, product fit challenges, etc.

Could it be possible to meet these informational requirements without the forms, without the time set aside to fill-out the forms either on paper or online? One solution could be sharing a strategy, if done in the right manner. The selling process is dynamic and normal planning tools will not work.

With more thinking invested in the campaign, good ideas will emerge that shorten sales cycles, expand revenue, and win sales. The net value will be to make the forecast more accurate because the adjustments to any plan can be made with help from other professionals.

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