

Avoiding the Chasm *or Help Has Arrived!*



Teetering on the edge of your sales campaign not knowing the next step? You know what needs to happen... close the deal, but there are several obstacles in the way preventing the final step such as the competition and the prospect's internal turmoil. What to do next is now the key, and you must ask yourself, have you really considered all the activities that might be effective? Which ones will move the process forward and which will undo the status quo?

For me this dilemma is still present based on an experience with a substantial sales opportunity where I looked into its future, and it was obscured. The “work” had been done but it was not closed. All the product discussions were over, the justification was documented, ROI accepted, contract monies and terms completed, and signing approvals more-or-less understood. But yet it would not close. Of course I was happy to be at that point, where all the normal work had been done, the kind any sales manager could bug me about. Instead I was simply questioned as to why it had not closed from management levels unheard from before. Something about the company's future had gotten my deal caught in their sights. I did not know why the opportunity would not close. My sponsor did not know, his executive managers did not know, and that is where the trail went cold.

I was at the edge. The abyss was in front of me. It was either a gaping hole someone was going to push me into, or uncharted waters that I would drown in. What was I going to do? How was I going to get across? Of course advice came from all quadrants:

From my sponsor: stay put and wait, things take time.

From my management: get to the CFO, he'll know the status, and call the EVP, it's his initiative, and find out where the paperwork is, and set up a meeting, and call the consulting firm, just do something, and be sure to call your sponsor again today.

The proactive advice had in common that there was one more step I was missing to “break the logjam”.

There I was after all this work and time, so close to the end. What I needed was a new start. I needed a plan, one that considered all that I had done before.

In reflection what I really needed was a method to *think out loud* (it's my style), to strategize, move some chess pieces around for kinds of things to do and in what possible sequence and over what possible time frame (immediately if not sooner). What dependencies existed, like if I do A then B, what happens if I do C?



What is the risk in that sequence? What had I done before that involved the same players? Would a sequence work differently if the timing were different? Are there several approaches that might work?

What I had was a pc, cell phone, Siebel SFA, and lots of time.

That reality, the one fact that sales professionals are intimately familiar with, is that I had plenty of time. Could I timeshare my attention effectively? No. Could I turn my energies to any of my other prospects? No. Could I keep asking for the right advice? No. Could I request more accounts? No. Could take some time off? No. Each day was excruciating and became so for my sponsor, and I guess for my upper management who would have preferred a less harrowing conclusion.

I desired a different mode of operation, one that would allow me to show what I had done, what I was doing, what I was planning, when and how all of these activities meshed, and the goal and the known required events before the goal could be nailed. I wanted to strategize and share my plans. A compelling urgency was born. Not a product concept but an awareness that something was missing in what I did every day.

At a sales meeting soon after this episode, we encountered another crisis that precipitated a demand for detailed documentation of our forecasted accounts to the tune of 10 pages each to be done over the weekend. I assume everyone complied as I did. After completion, no one mentioned those account profiles, nor acknowledged the many hours it took to assemble accurate information. The ruse for the work was simply a guarantee, that if we filled out the forms, then we had analyzed the accounts sufficiently to make the forecast more accurate than before. I felt confounded. I vowed then to develop an answer to management's occasional demand for detailed account activity. My anxiety transformed into a need to strategize/plan so I would not arrive at the edge of a big deal again.

I had to see major campaign futures as a logical extension of today and of yesterday, not to come to a complete halt in the "red zone". I also wanted to use this same thinking in the less stressful campaigns so they would move inexorably to close. I wanted to *think out loud* in every campaign. Then I thought: how do I really get "in" every campaign?

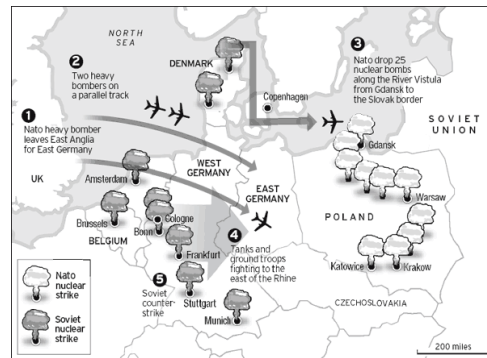


Before I could solve all these interesting questions and urgings, the deal closed and was the largest deal to date for the company. The company survived and prospered. Soon after I built a methodology and then a product to enable sales professionals to strategize, plan, visualize, track, share and integrate with Salesforce.com. I use it everyday.

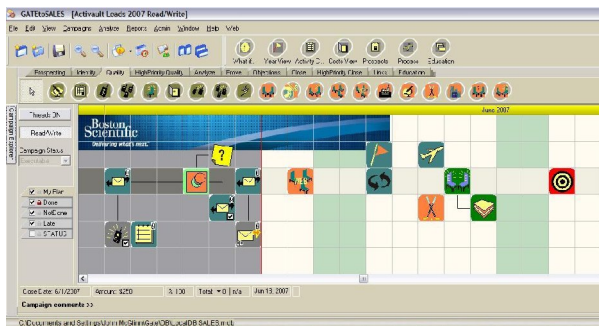
The methodology we must all apply more effectively is strategizing, not found in current SFA because that is all about recording, not thinking ahead. Reps need to strategize more to anticipate economic influences, the target company's changing priorities and the competition. We cannot succeed by stepping from one activity to the next "naturally". We need to manage the situation as much as possible. The one method to protect ourselves and anticipate the right next-step is to strategize and plan effectively. We do not now because no reasonable technique is at our fingertips... or cursor.



WWII UK Strategy Room



Cold War Plan



GATEtoSALES screenshot

Our break-through product GATEtoSALES provides the methodology to create campaigns in one place, a cohesive view with past and future. This campaign or “thinking space” enables the sales professional to arrange and sequence company-specific sales activities into an account plan. This method of *thinking out loud* helps us to contemplate each campaign’s next-steps, to trap good ideas, to strategize and plan every campaign worth winning.

Seeing the layout of a plan creates continuity to the collection of events and activities we call the sales cycle. That sense of continuity is unique with GATEtoSALES and allows for more effective strategizing, planning and tracking. This distinction is significant because **strategizing improves performance**. The resulting overview or *vision for success* provides a constantly evolving plan of action that helps us see our path to the close. Now our forecasting is more accurate, and success can be planned. Click the “Sf.com” button, and GATE updates Salesforce.com... way before the edge!

Help has finally arrived! Contact info@GATEtoGOALS.com