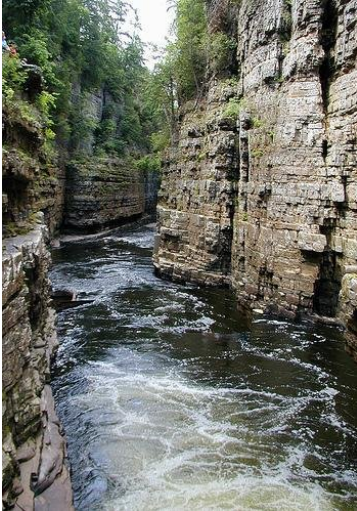


# “Do a Plan” to Validate the Forecast *or Guess?*

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## **Difficult Process**

“It’s tough to make predictions, especially about the future.” – Yogi Berra

Strategizing/planning/forecasting in sales is difficult because the future is not ours to control. Even trickier is the sales manager’s interpretation of the sales situation via the sales representative’s perception.

We are analyzing complex, extended B2B, big-ticket items, and introductory products/services sales where the only way to manage success is to strategize/plan effectively.

In his book [Sales Management](#) of the McGraw-Hill Executive MBA Series, 2001, author Bob Calvin says: “The best sales managers realize they are agents of change and as such, they must manage change and change people’s behavior. The twenty-first century will be even more turbulent than the 1990’s. Rapidly changing competitors, products, technologies, markets, and customers make business a dynamic process where the future is a moving target.” In these times how does the sales manager help the sales representative navigate the possible routes to close or develop a *vision for success?*

## **A Necessity**

If there is money to be had in sales, then there is competition. And not just from the competitors, but from the economy for funds and spending influences, and from internal priorities that shift with quarter results and personnel changes. These factors create a dynamic environment that impacts the flow, direction, speed, and success of big-ticket sales. That situation can be overwhelming for the sales professional. On the surface the representative may appear busy, but over time actions may not result in real progress, or the representative may be stalled with no plans at all. The sales representative must achieve a level of perception that generates a *vision to succeed*.

To manage the influences above, strategizing becomes essential for navigating the routes to sales success. Strategizing is the analysis of possibilities that lead to a goal. For a strategy to be useful, the definition of possible actions and their sequence is required. This mental process can shrink the time to the projected goal and define the steps for its achievement. What is natural thinking for some sales professionals is not evident in the day-to-day work processes of the majority of salespeople. Do we need to encourage this strategizing activity? If you wanted to, how would you accomplish it?

## Your Experience

Have you ever asked a sales representative to do an account plan to validate his/her forecast?



Did they document their next steps with pen/paper, PowerPoint, Word, Excel, or in your special format? Did they finish the exercise to help themselves think through the necessary steps or to please you, the sales manager? Did you ever look at it? Was it actionable? Did the representative ever look at it again? Did recent events obsolete the effort? And, when does a plan become a stale strategy?

We know planning gives direction at least for the near term. The manager can follow-up easily reinforcing the strategy and the planned activities, given the right environment for the dialog. If the initial outcome is not what is expected, adjustments can be made to both the strategy and plan. This back-and-forth is part of coaching, a future discussion topic. As the number of reps and campaigns rise, this effort cannot be spontaneous. It must be systematized. For now we can say sales success requires coordination of team resources. This quarterbacking requires informal, private contemplation or strategizing, and more formalized, “public” sharing of plans.

## Strategy/Planning Limitations

A strategy is an over-arching concept almost independent from its implementation, and its plan is its execution. The planning process needs certainty, or it is a waste of time. On the other hand, strategizing in a dynamic environment must continually accommodate change. This conflict (certainty>plan and change>strategizing) is why sales professionals do not plan effectively, and why forecast accuracy is an irritant to all concerned.

In his recent Harvard Business Review article July-Aug. 2007, Paul Saffo notes: “The problem – and what makes forecasting hard – is that human nature is hardwired to abhor uncertainty”.

- Does the representative really feel comfortable peering into the future?
- Has he or she enough experience to develop a vision of what the future could or should be?
- Have you provided any environment or guidance for strategizing?
- How do representatives communicate their thinking to you or to their support team?

So why strategize and plan? Because we forecast to win!

- Does the strategy employed affect successful results and the forecast?
- Would forecasts be more believable and valid if a strategy/plan were in place before the forecast was provided?
- Are your representatives required to have a strategy to forecast closes?

- Do you ask them to revisit their forecasts often or just periodically?
- Do all your representatives have the mental capacity to think into the future, to create a *vision for success*?

Any progress assessment is influenced by what Mr. Saffo discusses in his article as the “cone of uncertainty” in forecasting. The cone widens as the time frame under consideration expands. This frustrates everyone. Mr. Saffo continues that “good forecasting is always an iterative process”. Does that force strategizing/planning to be iterative? If so, is it encouraged, where and how is it accomplished, and is it managed?

### **What is to be done?**

*How can we raise the awareness in your organization that better forecasting and performance results from effective strategizing/planning?*



### **Solution**

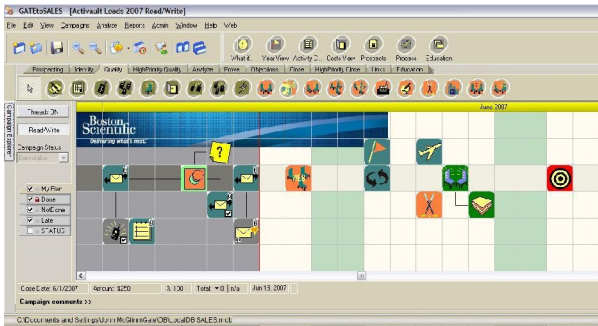
The sales organization, i.e., the individual contributor, needs to think through each campaign in every account, then to execute: to take action, to track and adjust, to share the vision with the team, and be coached along the way from successful experience. To accomplish that, many vectors need to converge in a sophisticated but easy-to-manage “thinking space” for campaign life cycle management... its goal: do more than just record.

- Speed learning curve
  - Increase campaign execution efficiency
  - Manage more opportunities
  - Enhance forecast accuracy
- ... all by focusing on the future not on the past.

Enter GATEtoSALES: a tool for sales professionals and their managers required to plan and execute extended, complex sales campaigns. It enables the process of evaluating, strategizing, building/executing plans for sales campaigns that cost time and money and add value to prospects. GATE is not big-picture CRM, nor a contact-manager derivative.

GATEtoSALES is the sales professional’s “thinking space” for strategizing, planning, and tracking activities in dynamic campaigns with results the professional is personally responsible for achieving. The product’s corporate value is productivity enhancement for individual users but also as an SFA front-end for higher quality content.

GATEtoSALES focuses on the campaign as a process made up of a user-defined activity sequence with a sales process in the background. It has an informal workflow scheme, completion status tracking, descriptive activity properties & attachments (documents, images, sounds, and videos), email-connection, Outlook scheduling, Excel interface, and synchronizes with Salesforce.com. In other words GATE creates a model of the campaign upstream from Sf.com.



GATeToSALES screenshot

The GATeToSALES methodology creates 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 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... with no guessing!

- *Pipelines become more credible, because sales effort is assisted, guided, coached, enhanced. Close dates become more reliable, because future activities are anticipated, thought-through. This is basic but critical.*
- *Representatives grow in sales-process awareness by visualizing the appropriate process and its steps.*
- *Representatives handle more campaigns, more opportunities, and more chances for quota achievement by managing more sales activity with a campaign-based system in addition to CRM/SFA and time-management tools.*
- *Managers develop representatives’ skills for increasing revenue by coaching from a documented “thinking space” that can be shared and discussed - coaching activity definition, sequence, timing, a vision for success without additional “reporting” methods.*
- *GATE becomes the platform for focusing on representatives’ effort, aptitude, creativeness, and competency.*
- *Company professionals at the periphery of the sales organization have access to CRM and now uniquely see Sales’ resource requirements via personalized access to GATE.*

GATeToSALES offers a unique opportunity to pursue strategizing and planning in your sales organization for more sales effectiveness and certainly improved forecasting.

*Help has finally arrived! Contact [info@GATeToGOALS.com](mailto:info@GATeToGOALS.com)*