

# WHY A WRITTEN SALES PLAN IS SO CRITICAL

Without a measurable and achievable strategic plan, you are shooting at the sky blindfolded, hoping to hit a duck. **A written plan is how you measure your success.** Further, planning enables the process of getting the entire management team on the same page. I'm going to focus on the SALES PLAN in this article.



So often, I meet business owners and managers that simply have no quantifiable sales plan on paper for their sales staff. Two of my favorite sayings are: **“if it doesn't get**

**measured, it doesn't get done,”** and **“if it's not in writing, it doesn't exist!”**

Therefore, it's vital that each salesperson in the organization knows the stated sales department goal, as well as the specific and measurable sales goal for each individual salesperson.

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There are three models at work when putting together a plan.

First, are the expectations used to produce the dollar volume portion of your plan, second is the leading principles of your company that propel

the success of the plan, and third, that plan must be S.M.A.R.T. – Specific, Measurable, Attainable, Relevant and Timely. Your planning will be more accurate and will have a far higher success rate when you make it a SMART plan.

## Evaluate All Aspects

Business owners often tell me they want to be a \$10 million company, (or more) but they don't always think through what actions or inputs are required to get them to that point. For example, what if you know that by making 200 cold (or lukewarm) sales visits in a month, you will generate \$100 thousand in newly identified sales opportunities in your sales funnel.

That means you need to make at least ten cold sales visits a day. Are you measuring how many visits are being made each day – week – month? And even more critical: Do you have the right people to accomplish this goal? The most critical is... are you holding the salespeople accountable to those numbers?

# It's Not All About the Numbers

Numbers are important because they provide a mechanism for measurement. However, in most plans, there's too much focus on the numbers and not enough on Attitude, Values, and Ethics. A good plan must go beyond the dollars and cents and focus on the second concept which are the principles that your business is going to live by. This part of planning breaks your business down to its most fundamental level in terms of challenging why you exist and what actions are required to get you to where you want to go.



The non-financial aspects of your plan will drive your success more than just putting numbers on paper. Your core values should be a set of timeless guiding principles that define your culture, who you are and what you stand for, keeping you from chasing the shiny red ball.

## Filtering Through the Right Lens

The third concept is making sure that you evaluate the plan through the “filter” of, is it S.M.A.R.T.? Remember, you have a limited number of resources and time, so it's vital that the plan is clearly defined and achievable. Part of that “filtering” also includes knowing not only if the plan is doable, but are the salespeople tasked with the job – the Right people? I see so many salespeople in the wrong seat – with an employer that wants to “give them more time – “because they are nice people.”

**Once you have put your sales plan to paper, it must be re-evaluated every three months, or no longer than once every six months.** Your written sales plan, with effective oversight, becomes your success roadmap – helping you reach your target.

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