

# How to **Plan your Sales** for IGCDP

## Basic Guide for Sales Planning

This is support document developed by the Sales Taskforce of IGCDP during RockMe 2015. It is meant to guide you in how to prepare your sales plan for any given edition. In case you need any further support, don't hesitate to get in touch with Georgiana Ion, NST Social Projects Sales Coordinator, at [ion.georgiana94@gmail.com](mailto:ion.georgiana94@gmail.com) or Jesus Navarro, MCVP IGCDP 15.16, at [jesus.navarropayares@aiesec.net](mailto:jesus.navarropayares@aiesec.net)

*Enjoy your Sales Planning process! (:*

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### **Step 1 - Finish your project budget and cash flow! And review your operational plan (specially accommodation).**

You can't define your sales goals and plan if the budget isn't ready. The budget is the one that will determinate the expenses that your team will have during the project in all aspects, and then the cash flow will determine when those expenses will happen. Based on the budget is when you and your team will know how much money should come from sales.

**For example:** if your budget determines you need 6000 Euros in expenses, and from other income sources (participants, donations, etc). you'll get 2500 Euros, it means your goal for sales would be 3500 Euros.

Also, keep in mind the two differentiations of *sales* that can come from the budget: **In-Kind Sales** and **Cash Sales**.

Maybe your 2500 Euros sales goal has 1000 Euros worth in logistics materials (flipcharts, markers, etc), so you can do *in-kinds* sales to get those things for free and thus crossing them off the budget. That way, you'd only have 1500 Euros worth in *Cash Sales*.

Something else worth mentioning is that accommodation is usually the biggest expense in the budget of any IGCDP project, and thus by covering accommodation with other means (Global Family, free dorm rooms, etc) all your cash-sales will go almost straight to profit. If you can't cover accommodation for free by any mean (although you should, with a good Global Family implementation), then your sales should be focused in covering accommodation costs mostly (if not totally).

**Reminder:** the national average of an accommodation spot per intern is **200 Euro**. In that sense, if you don't have free accommodation, your sales planning should be very much focused in covering the accommodation expected for the number of interns.

## **Step 2 - Plan your sales goals per process and the conversion rate.**

**Let's take as example an LC running Discover with a goal of 10 Realizations.**

This LC should be running Global Family integrated into Discover (if they don't have free accommodation through other means like university), and because of all basically all their cash-sales money should be going straight to profit. But let's assume (for educational reasons) that Jupiter is retrograde and because of that they didn't get a single accommodation spot in Global Family (lol) and thus all the responsibility of finding the money for accommodation for the 10 Intern falls on the Sales shoulders.

If we take the cost of the accommodation for an EP of 200 Euros, this means that for the 10 interns you need to sign contracts of the total amount of 2000 Euros.

In the case of Discover, the most basic sales package is worth 400 Euros.

So, in order to gain the sum of 2000 Euros to cover for their accommodation of 10 Interns, you need to **sign 5 contracts worth of 400 euro's**. But if you want to make the project at least a minimum profitable, we will increase the number of basic packages sold to companies from **5 to 6**;

This way, you have a total income of **2400 Euro's**.

In order to reach this, here is an example of calculations for the conversion rates per process: numbers of cold-calls made, number of meetings established and the average number of contracts signed (keep in mind that the percentage for each conversion depends on the effectiveness of your sales team).

50 Companies Called -> 10 Meetings -> 1 Signed Contract

*and thus*

300 companies called -> 60 meetings -> 6 signed contracts

Based on this, here's an example of how the sales plan could look like:

**October /Week 4 to November / Week 4:**

- 50 calls per week
- 4 meetings per week

By the **1<sup>st</sup> week of December** you should have at least **70% of the budget** (70% out of 2400 = 1680 euro's). This means that by this time you should have at least **4 contracts out of 6** signed.

Throughout December, you have 50 companies left to contact, and if in the **1<sup>st</sup> and 2<sup>nd</sup>** week of this month you do 20 meeting with the companies per team, and in the **1<sup>st</sup> week of January** you have 20 meetings left to do.

By **week number 2 of January**, right before the project starts, you should have the contracts signed in worth of the 2400 euro's previously mentioned.

***NOTE! By the beginning of December you should start the account management with the companies you have signed with.***

Another way for you to reach profit is once you have the finalized budget for the project and you increase the targeted sum by 20%, we create a buffer-sum in order to make sure you have profit.

Ultimately, it is up to you to plan your **sales intensity**. This basically means how many cold calls, meetings and contracts you expect to have per week. You can have it widespread across various weeks, with a relatively consistent number, or you can have it very intense with only one week of doing all the cold calls, and then have a lot of meetings in only two weeks. It will depend in your goals and cashflow, as well as the capacity and time of your team members.

## **Put your goals into the planning & tracking tool.**

We have created a standard tool for all the LCs to support you in (1) planning your sales goals per process per week, (2) track your progress in the achievement of those goals and (3) keep track of the companies you defined during your market segmentation. You can find it [here](#).

The tool is standard for the three projects, however you only need to fill it for the projects you are running in your LC.

## 1. Sales Managers per project and Cash-Sales targets per project and month

IGCDP Sales Tracking Tool: Arad						
Sales Mng	Discover:		Grow:		Become:	
Cash Incomes						
	October		November		December	
	Planned	Achieved	Planned	Achieved	Planned	Achieved
Discover						
Grow						
Become						

Here you simply need to put the names of the Sales Manager of each project team. Then, in the "Planned" columns, put the goal of cash-sales (in Euros) for each project, for each month. That way you'll be able to see how much money your IGCDP area needs to make in total, per month and per project, and track every month how that is happening or not by registering it in the "Achieved" columns.

## 2. Weekly Goals per process and tracking of those goals

October			
Week 4			
Cold Calls		Meetings	
Planned	Achieved	Planned	Achieved
Contracts Signed			
Planned	Achieved	Ammount of Money	
What happened this week?			
Achievements			
Challenges			

For every week, since the last one of October until the end of December, you'll have columns for the 3 main processes of sales: Cold Calls/Contacts, Meetings and Contracts Signed.

Once you finish your planning, you should have a goal for each process across the weeks, and by achieving those goals you should be able to meet your cash-sales target.

Weekly, you should have the discipline to come to the Tracking Tool and very objectively track the performance of your sales during that week. In the "Achieved" columns put what was accomplished and compare it with the planned. In case there are any gaps (underachievement) then the missing numbers will add up to the next week and you'll need to make an extra effort to meet your goals and ensure you are achieving the goals you set. Keep in mind the "Snowball effect", which means that the less you achieve your goals weekly the bigger the gap you'll have, and thus the more and more you'll have to achieve in the next week, until a point it's going to be such a big number it will seem impossible.

Last but not least, there's a mini-space for quick weekly journaling. Simple write the main achievements and challenges you had that week as a way to have an introspection and be able to identify common patterns that might be supporting you or stopping you from success, and where the main bottlenecks are.

As an example, in the achievements part could be "setting meetings with 3 companies through Alumni", and in the challenges could be "difficulty during the sales meeting because I didn't have the sales brochures in time as expected from the national level (lol)".

### 3. Weekly Goals per process and tracking of those goals

Companies Targeted (Prospect List from Market Segmentation)					
Name	Target Cash	Achieved Cash	Project	Responsible	Status

Last but not least, there's a space for you to register all the companies you have prospected from your Market Segmentation (to know how to do Market Segmentation, read also the guide booklet! Find it [here](#)). There you can keep track of the sales goal for each one, for which project are you selling, who's the member responsible for that account and what's the current status (contacted, in negotiations, contract signed, etc).

This will help you to keep track of your prospect list for the sales strategy. Once you have closed a deal and signed the contract, please don't forget to register your brand new partner in the national Customer Relationship Management (CRM) tool for IGCDP, [here](#).

### Step 3 – Get started and track your progress weekly!

You are ready with all the preparation required!

The 3<sup>rd</sup> and last step needed for your Sales Planning is to actually make it happen! Pick up the phone and start doing Cold Calls, scheduling meetings and making things happen to achieve your weekly targets!

**Remember:** a plan is only as good as its execution! The perfect sales plan, goals, target and segmentation will be completely useless if you don't take action and start the calls, the emails, meetings and negotiations. **Dare to go out there and do sales!**

Also remember that a key for success is **discipline**, which is translated into **weekly tracking**, use the tracking tool for that, and be humble to admit when results aren't being met and define clear and simple action steps to even overachieve your plans!

# Thank you!

Special thanks to the IGCDP Sales Taskforce of RockMe 2015 for setting the base for this document by consolidating the output of the Sales Workshop of the IGCDP Functional Track.

## IGCDP Sales Taskforce of RockMe 2015

**Rotariu Larisa**, VP IGCDP, AIESEC in Brasov

[larisarotariu20@gmail.com](mailto:larisarotariu20@gmail.com)

**Sibisan Alexandra**, OCVF Comm. and Reception RYLF 2015, AIESEC in Cluj-Napoca

[sibisan.ioana.alexandra@gmail.com](mailto:sibisan.ioana.alexandra@gmail.com)

**Endres Robert**, Local Project Manager Grow, AIESEC in Timisoara

[endresrobert5@gmail.com](mailto:endresrobert5@gmail.com)

**Matau Mariana-Elena**, member of IGCDP, AIESEC in Bucharest

[mariana.matau@gmail.com](mailto:mariana.matau@gmail.com)

If you have any questions, comments, ideas or you need help or support just contact us:

**Georgiana Ion**, IGCDP NST Social Projects Sales Coordinator

[ion.georgiana94@gmail.com](mailto:ion.georgiana94@gmail.com)

**Jesus Navarro**, MCVP IGCDP 15.16, AIESEC in Romania

[jesus.navarropayares@aiesec.net](mailto:jesus.navarropayares@aiesec.net)