Aligning Sales Execution With Account Planning

Sales managers are defined by results - unless your team is delivering steady, predictable sales revenue, all the planning and strategic thinking in the world will not save you. While every sales managers employs a methodology based on stated objectives, execution and accountability up and down the chain, those at the very top of the game never lose sight of the fundamental reality that tactical execution is all that really matters - this is where most of their focus lies.

Companies selling into the Government Agency & Public Utility marketplace face unique hurdles to traditional sales planning and execution: utilities are highly regulated, impose certification and pre-qualification requirements, proposal and bidding procedures and timing are complex and pricing is typically subject to regulatory control. This bulletin considers sales management practices in light of these unique challenges.

Top Down Is Nice (In Theory)...But We Live In A Bottoms Up World

Sales management specialists spend a lot of time advising to begin with a high level objective and work your way down from there to define ground level execution - an admirable goal that completely ignores reality. Any sales manager will tell you that they spend most of their time in the tactical realm - i.e. some brush fire tied directly to winning or losing revenue. Don't fight reality. Embrace it and use it to your advantage. Tactical day-to-day issues are a reality check that informs and improves your strategic objectives. Without tactical validation, feedback and adjustment, strategic objectives are merely wishful thinking.

To illustrate this consider a typical sales management plan structure to see how this unfolds in the real world. The following planning framework should look familiar to any sales manager in a moderately sophisticated sales organization selling to Public Utilities.

Figure 1 - Top Down Sales Planning & Management Framework
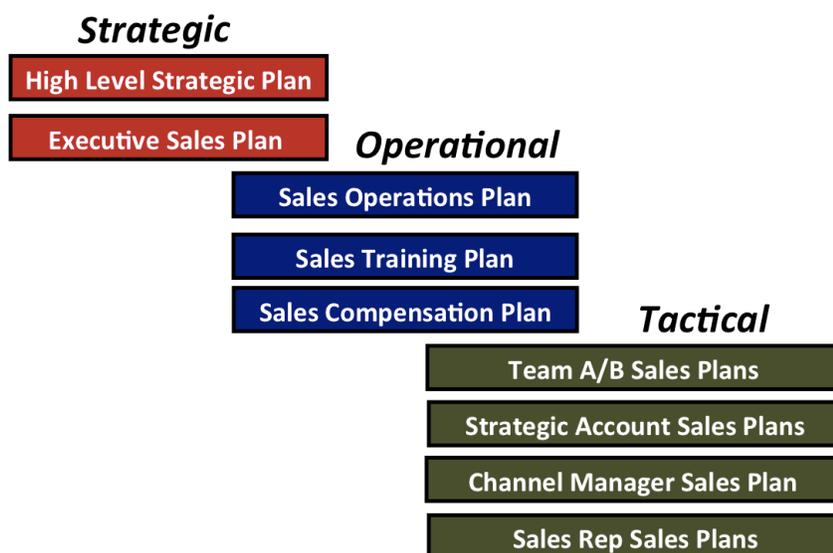
This "waterfall" framework contains all the components of a traditional corporate sales strategy, beginning with a High Level Strategic Plan that includes the overall objectives and performance metrics that drive the entire company. The Executive Sales Plan lays these out specifically for the sales organization. The operational sales plans define the "nuts and bolts" that need to be in place to execute the strategy and the tactical plans, if executed correctly, actually result in revenue.

Since the tactical elements are closest to revenue, the activities in these plans should inform and refine the top-level strategy. The key to effective execution here is centralization - relying on a *single source of the truth* where the entire strategy resides. This can be a sophisticated ERP system or a well-managed spreadsheet but the essential element is that no action, trigger or result can escape being captured, tracked and reported. Since the former is very expensive and the latter can be easily overwhelmed, the example below uses an efficient method that leverages an existing CRM system augmented by a unified sales planning application. This example uses Salesforce.com CRM enhanced with the Longitude Sales Management application. While these applications are automated and pre-configured to save time, discipline around the underlying workflow is what makes this work - no system can survive bad data. These examples look at 3 existing customer profiles (from mature to new) and the key considerations for tying the tactical execution to the overall revenue plan.

Strategy: Developing Predictable Revenue In Mature Accounts.

Unless you are new entrant to the market, you already have several established customers capable of producing a steady, dependable revenue stream. You have a billing relationship, you know the key decision makers and have likely developed insight into their vendor selection, purchase and funding processes. The key to ensuring steady revenue from these accounts is a clear and realistic Account Plan that ties your account manager's compensation and incentive package to delivering this specific result. The following Account Plan example for the Burlington Electric Department lays out specific initiatives around projects under approved budget, sales incentives to the customer and a compensation package for the account manager that links to these results.

Figure 2 - Example of the Burlington Public Utility Overall Revenue Growth Plan
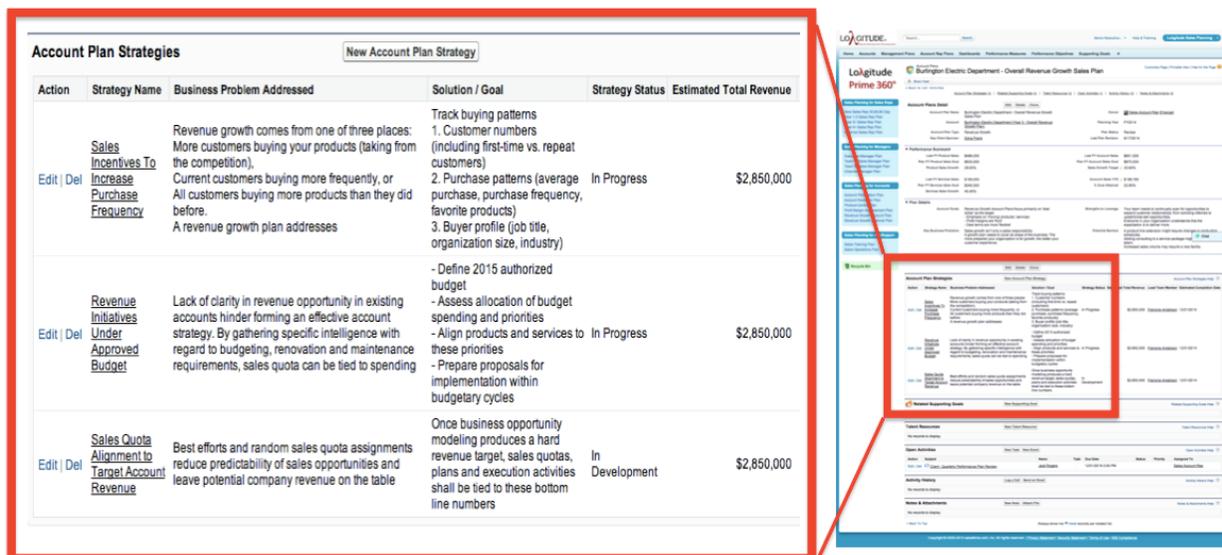
The process described above assumes that every stakeholder in the sales organization is operating from an interlinked set of execution plans that waterfall down from a high level strategic plan. The key to making this process work however is that execution and results at every level are tracked in real time - hence the logic of leveraging the CRM system, which is the best resource to track sales activity. Drilling down into the execution strategy in the example above titled "Revenue Initiatives Under Approved Budget" reveals how this would look in practice. It lists and tracks the status of every tactical action that needs to be accomplished, including the stakeholder responsible for its completion, its schedule, supporting documentation and a record of all activities:

Figure 3 - Account Plan Strategy

These, in turn, are tied to specific revenue performance metrics that are monitored and reported in real time to ensure that activity is tracked to results:

Figure 4 - Performance Scorecard

Finally, these performance metrics cascade upward from the account rep level into higher level plans (and across to relevant stakeholder plans such as marketing, engineering, etc.) to ensure everyone is tracking results and making course corrections *in real time*.

Figure 5 - Performance Reporting Cascade - Upstream Workflow (See Appendix A)

| Account Rep Plan | Team "A" Sales Plan | Executive Sales Plan | Overall Strategy |
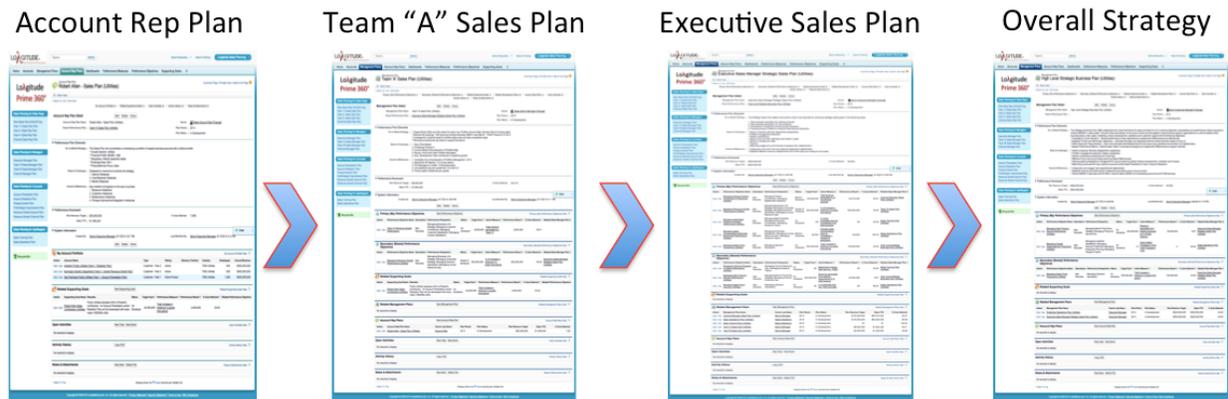
By employing a clear, unified and disciplined approach to sales management and execution, sales results become predictive rather than reactive. The sales incentives, compensation and quota for the account representative best positioned to make the initiative succeed is now tied to a definitive and transparent process. Every stakeholder is clear on their specific responsibilities and expectations. Most importantly, the top level strategy of "get more revenue" is no longer vague, illusory or aspirational - its tied to a specific plan to get specific results where progress is transparent and monitored in real time.

Strategy: Account Radiation In Mid-Stage Accounts

A 'radiation' Account Plan is typically employed in the second year of a relationship. Focused on expanding the number of customer 'business units' and sales opportunities, it is designed to build a dependable revenue stream and reduce the risk of losing traction with a single customer. The success of this Account Plan is dependent on the degree of customer satisfaction achieved in the first year of the relationship, and their willingness to 'open doors' to other opportunities within the organization.

The following is an example of an Account Radiation Plan for the Anaheim Public Utilities that employs 3 strategies - a "proof of concept" strategy to show the customer a reduced risk path to consider new technologies, penetrating into newly created customer subsidiaries and securing internal referrals by key influencers in the organization. As illustrated previously, each of these strategies is solidly embedded in the sales plan of the account representative managing the account and plus in every stakeholder responsible for some aspect of its execution. Key performance metrics at each step are reported and tracked up the chain of command in real time.

Figure 6 - Anaheim Public Utilities - Account Radiation Sales Plan

Account Plan Strategies — New Account Plan Strategy

Action	Strategy Name	Business Problem Addressed	Solution / Goal	Strategy Status
Edit | Del	Anaheim Underground Conversion - Proof of Concept	Public Utility "Sunshine Law" governance requirements makes them reluctant to take chances with unproven or new solutions. This can make it difficult to do expand revenue opportunities in these accounts.	A proof-of-concept (trial) demonstrates on a small scale what the customer can ultimately receive. The trial helps to establish viability, to isolate technical issues, and to suggest overall direction, as well as providing feedback for budgeting.	In Development
Edit | Del	Penetrate Untapped or Newly Created Subsidiaries	New public funding initiatives have created 3 new subsidiaries that can benefit from our offerings and there are 2 untapped orgs. With an estimated annual budget of $45 Million, it is essential that we position ourselves to be a prime source contractor	Secure a minimum commitment of $25 Million in additional annual contracts	In Development
Edit | Del	Internal Customer Referrals	Revenue growth comes from one of three places: More customers buying your products (taking from the competition), Current customers buying more frequently, or All customers buying more products than they did before. A revenue growth plan addresses	Track buying patterns 1. Customer numbers (including first-time vs. repeat customers) 2. Purchase patterns (average purchase, purchase frequency, favorite products) 3. Buyer profile (job title, organization size, industry)	In Progress

As with any sales plan, this "proposal" strategy is broken down to individual actions to be assigned, executed, tracked within the context of the overall initiative and their results tied to compensation plans of the individuals responsible for delivering a result:

Figures 7 - Underground Conversion Proof of Concept Strategy and Revenue Tracking Metrics

Open Activities — New Task | New Event

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit | Cls	Discovery meeting with City Manager		✓	10/1/2014	Not Started	Normal	Sales Account Rep
Edit | Cls	Develop List of Competitive Vendors & Solutions		✓	10/8/2014	Not Started	Normal	Sales Account Rep
Edit | Cls	Preliminary Proof of Concept Engineering Drawings		✓	10/15/2014	Not Started	Normal	Manager Sales Operations
Edit | Cls	Draft Proof of Concept Delivery		✓	10/22/2014	Not Started	Normal	Manager Sales Operations
Edit | Cls	Proof of Concept Budget Review		✓	10/24/2014	Not Started	Normal	Manager Sales Operations

Notes & Attachments — New Note | Attach File | View All

Action	Type	Title	Last Modified	Created By
Edit | View | Del	Attachment	City_of_Anaheim_Budget_Adopted_FINAL.pdf	6/25/2014 1:28 PM	Senior Executive Manager
Edit | View | Del	Attachment	City of Anaheim Org Chart.ppt	6/23/2014 6:18 PM	Senior Executive Manager
Edit | View | Del	Attachment	Proof of Concept Overview.docx	6/23/2014 6:13 PM	Senior Executive Manager
Edit | View | Del	Attachment	Anaheim Undergrounding Conversion Overview.docx	6/23/2014 6:12 PM	Senior Executive Manager

▼ Performance Scorecard

Last FY Product Sales	$1,680,000		Last FY Account Sales	$2,330,000
Plan FY Product Sales Goal	$2,000,000		Plan FY Account Sales Goal	$2,850,000
Product Sales Growth	19.05%		Sales Growth Target	22.32%
Last FY Services Sales	$650,000		Account Sales YTD	$1,456,324
Plan FY Services Sales Goal	$850,000		% Goal Attained	51.10%
Services Sales Growth	30.77%			

Strategy: Account Penetration In Early-Stage Accounts

Perhaps the most challenging time to engage with a customer is when they are new. There is rarely a basis to have developed sufficient trust, knowledge about the organizational decision making hierarchy is sparse and the "pain" to the customer of severing the relationship is minimal.

The primary objective of a "penetration" Account Plan is to establish an initial transactional relationship with the Account. It is essential to quickly establish who the key players are and important that you gain trust quickly by offering pricing incentives, trial periods and deal "sweeteners" that place your organizations in the most favorable light. Its also critical that you establish your company as being easy to do business with and to reinforce every non-financial advantage over competitors since you need to avoid a "race to the bottom" on pricing to maintain profitable revenue margins.

The following penetration Account Plan for the San Francisco Public Utilities encompasses two strategies aimed at delivering value without requiring the surrender of significant revenue potential. The first is a Service and Support Communications Plan that ensures that every customer decision make and influencer is made aware that your company will stand behind and support every product delivered and/or service rendered during the relationship. While this can be a highly structured or informal process, the key with regard to unified sales management is that everyone from the sales, marketing and support organization proceed in a highly coordinated manner. Even though the "outputs" may not be directly related to revenue (i.e building trust) there needs to be a very specific result and outcome defined that is measurable and verifiable.

Figure 8 - San Francisco Public Utilities Penetration Plan
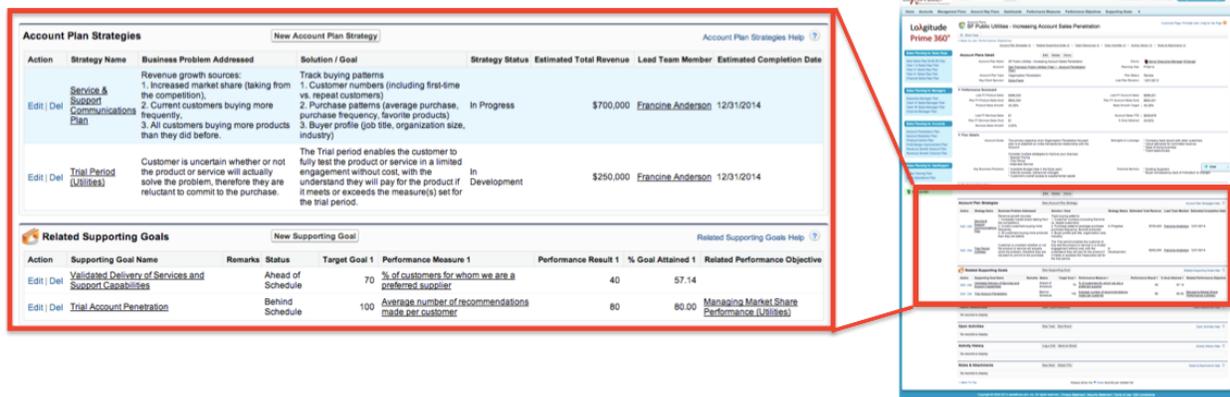
Hopefully the examples cited in this bulletin have provided helpful context to enable companies selling into the Public Utilities space to improve their effectiveness at maximizing revenue from existing accounts and creating a more predictable revenue stream, In the final analysis, a process-based approach to account sales management will invariably translate into more reliable strategic planning for the entire company and predictable revenue.

Appendix - Sales Plan Examples

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- Year 1-2 Sales Rep Plan
- Year 3+ Sales Rep Plan
- Year 4+ Sales Rep Plan
- Channel Sales Rep Plan

Sales Planning for Managers
- Executive Manager Plan
- Team 'A' Sales Manager Plan
- Team 'B' Sales Manager Plan
- Channel Manager Plan

Sales Planning for Accounts
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- Account Radiation Plan
- Product-Centric Plan
- Profit Margin Improvement Plan
- Revenue Growth Account Plan
- Revenue Growth Channel Plan

Sales Planning for Ops/Support
- Sales Training Plan
- Sales Operations Plan

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Account Rep Plan
Robert Allen - Sales Plan (Utilities)

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« Back to List: Activities

My Account Portfolio [3] | Related Supporting Goals [1] | Open Activities [3] | Activity History [1] | Notes & Attachments [0]

Account Rep Plan Detail   Edit | Delete | Clone

Account Rep Plan Name	Robert Allen - Sales Plan (Utilities)	Owner	Sales Account Rep [Change]
Parent Performance Plan	Team 'A' Sales Plan (Utilities)	Plan Period	2014
		Plan Status	In Development

▼ **Performance Plan Elements**

Go to Market Strategy ⓘ This Sales Plan will concentrate on developing a portfolio of repeat business accounts with a distinct profile:
* Industry Sectors: Utilities
* Financial Profile: $500M - $3B
* Geography: Atlantic seaboard states
* Employee Size: 500 >
* Product/Service Focus: Open

Risks & Challenges ⓘ Obstacles to overcome to achieve the strategy.
1. Internal Obstacles
2. Client/Sectoral Obstacles
3. Market Obstacles

Events & Milestones ⓘ Key markers of progress on the way to success.
1. Revenue milestones
2. Customer milestones
3. Relationship milestones
4. Process improvement/integration milestones

▼ **Performance Scorecard**

Plan Revenue Target ⓘ	$20,000,000	% Goal Attained	7.28%
Sales YTD ⓘ	$1,456,324		

▼ **System Information**

Created By	Senior Executive Manager, 6/17/2014 3:01 PM	Last Modified By	Senior Executive Manager, 6/17/2014 4:12 PM

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📁 My Account Portfolio
My Account Portfolio Help ?

Action	Account Name	Type	Rating	Revenue Timeline	Industry	Employees	Annual Revenue
Edit	Del	Anaheim Public Utilities (Year 2 - Radiation Plan)	Customer - Year 2	Active		7500 Utilities	543	$500,000,000
Edit	Del	Burlington Electric Department (Year 3 - Overall Revenue Growth Plan)	Customer - Year 3	Active		7500 Utilities	600	$500,000,000
Edit	Del	San Francisco Public Utilities (Year 1 - Account Penetration Plan)	Customer - Year 1	Active Pursuit		7500 Utilities	1,500	$500,000,000

🎯 Related Supporting Goals
New Supporting Goal   Related Supporting Goals Help ?

Action	Supporting Goal Name	Remarks	Status	Target Goal 1	Performance Measure 1	Performance Result 1	% Goal Attained 1	Related Performance Objective
Edit	Del	Robert Allen Sales Contribution (Utilities)	Public Utilities represent 40% of Robert's contribution. An Account Penetration and/or Radiation Plan will be developed with every major (>$500M) utility	On Schedule	20,000,000	Total increase in revenue in a given time period	5,000,000	25.00	

Open Activities
New Task | New Event   Open Activities Help ?

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit	Cls	Discovery meeting with AnaheimCity Manager		✓	6/17/2014	Not Started	Normal	Sales Account Rep
Edit	Cls	Develop List of Anaheim Competitive Vendors & Solutions		✓	8/19/2014	Not Started	Normal	Sales Account Rep
Edit	Cls	Develop Decision Maker/ Influencer Relationships in New Subsidiaries		✓	11/13/2014	Not Started	Normal	Sales Account Rep

Activity History
Log a Call | View All   Activity History Help ?

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit	Del	Call with Anahiem City Manager re Bid Selection		✓	6/29/2014	Sales Account Rep	6/29/2014 3:37 PM

Notes & Attachments
New Note | Attach File   Notes & Attachments Help ?

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Team 'A' Sales Plan (Utilities)

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Primary (My) Performance Objectives [1] | Secondary (Shared) Performance Objectives [1] | Related Supporting Goals [1] | Related Management Plans [0] | Account Rep Plans [1] | Open Activities [0] | Activity History [0] | Notes & Attachments [0]

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Product-Centric Plan
Profit Margin Improvement Plan
Revenue Growth Account Plan
Revenue Growth Channel Plan

Sales Planning for Ops/Support
Sales Training Plan
Sales Operations Plan

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Management Plan Detail

[Edit] [Delete] [Clone]

Management Plan Name	Team 'A' Sales Plan (Utilities)	Owner	👤 Sales Senior Manager [Change]
Parent Performance Plan	Executive Sales Manager Strategic Sales Plan (Utilities)	Plan Period ⓘ	2014
		Plan Status ⓘ	In Development

▼ Performance Plan Elements

Go to Market Strategy ⓘ
* Target Global 2000 and their peers for action-ing: Portfolio Account Mgt, Demand Gen & Closing deals
* Execute the bookings: 10M recurring contract business, 885K in services & 1.18 Mil 'Product A' in 2012
* Leverage the Customer base for shorter sales cycle and less competitive opps.
*Training and personnel dev plans to support the above

Risks & Challenges ⓘ
1. Size of the Market
2. Increasing Closing %
3. Current Sales Force execution of Portfolio Mgt
4. Recruit, hire & train New Portfolio Managers
5. Acct. Development Team contribution to pipeline growth.

Events & Milestones ⓘ
1. Complete roll out & execution of Portfolio Managment - 2012
2. Sales Kick off meeting 1/12 (Comp plans)
3. Port Managers to create '12 Business plans
4. Hire additonal rep per quarter Q3-12 to Q4 012
5. Product sales milestones per quarter

▼ Performance Scorecard

Plan Revenue Target ⓘ	$6,000,000	% Goal Attained	30.41%
Sales YTD ⓘ	$1,824,324		

▼ System Information

Created By	Senior Executive Manager, 6/17/2014 3:06 PM	Last Modified By	Senior Executive Manager, 6/17/2014 4:11 PM

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[Edit] [Delete] [Clone]

✳ Primary (My) Performance Objectives

[New Performance Objective]   Primary (My) Performance Objectives Help ⓘ

Action	Performance Objective Name	Description	Performance Perspective	Status	Target Goal 1	Active Measure 1	Performance Result 1	% Goal Attained 1	Related Sales Manager Plan 2
Edit | Del	Team 'A' Revenue Growth Performance	See Remarks	Managing Business Unit Strategy; Managing Customer Contribution; Managing Customer Satisfaction; Managing Investor Satisfaction	On Schedule	6,000,000	Total revenue generated by - Team 'A'	3,204,324	53.41	

✳ Secondary (Shared) Performance Objectives

Secondary (Shared) Performance Objectives Help ⓘ

Action	Performance Objective Name	Description	Performance Perspective	Status	Target Goal 1	Active Measure 1	Performance Result 1	% Goal Attained 1	Related Sales Manager Plan 1
Edit | Del	Managing Revenue Growth Performance (Utilities)	See Remarks	Managing Business Unit Strategy; Managing Corporate Strategy; Managing Demand Generation; Managing Human Resource Ops.	Ahead of Schedule	500,000,000	% of increase in revenue in a given time period	200,000,000	40.00	Executive Sales Manager Strategic Sales Plan (Utilities)

🔥 Related Supporting Goals

Related Supporting Goals Help ⓘ

Action	Supporting Goal Name	Remarks	Status	Target Goal 1	Performance Measure 1	Performance Result 1	% Goal Attained 1	Related Performance Objective
Edit | Del	Robert Allen Sales Contribution (Utilities)	Public Utilities represent 40% of Robert's contribution. An Account Penetration and/or Radiation Plan will be developed with every major (>$500M) utility	On Schedule	20,000,000	Total increase in revenue in a given time period	5,000,000	25.00	

📋 Related Management Plans

[New Management Plan]   Related Management Plans Help ⓘ

No records to display

💵 Account Rep Plans

[New Account Rep Plan]   Account Rep Plans Help ⓘ

Action	Account Rep Plan Name	Owner Last Name	Plan Period	Plan Status	Plan Revenue Target	Sales YTD	% Goal Attained
Edit | Del	Robert Allen - Sales Plan (Utilities)	Account Rep	2014	In Development	$20,000,000	$1,456,324	7.28

Open Activities

[New Task] [New Event]   Open Activities Help ⓘ

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Activity History

[Log a Call]   Activity History Help ⓘ

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Notes & Attachments

[New Note] [Attach File]   Notes & Attachments Help ⓘ

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Management Plan
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Primary (My) Performance Objectives [5] | Secondary (Shared) Performance Objectives [3] | Related Supporting Goals [0] | Related Management Plans [5] | Account Rep Plans [0] | Open Activities [0] |
Activity History [0] | Notes & Attachments [0]

Management Plan Detail   [Edit] [Delete] [Clone]

Management Plan Name	Executive Sales Manager Strategic Sales Plan (Utilities)	Owner	🧍 Senior Executive Manager [Change]
Parent Performance Plan ○	High Level Strategic Business Plan (Utilities)	Plan Period ○	2014
		Plan Status ○	In Development

▼ Performance Plan Elements

Go to Market Strategy ○ The Strategic Sales Plan details what actions need to be executed for achieving strategic sales goals in the following areas:

1. New business acquisition for existing products
2. New business acquisition for new products
3. Acceleration of existing business growth strategies
4. Focusing Account Teams on Account Planning and Execution

Risks & Challenges ○ * Ability to execute internally department (leadership)
* Portfolio management execution
* Partner contributions
* Ability to hire and train alternate cost model in sales
* Ability to increase win rates
* Training
* Obtaining budget and commitments necessary from stakeholders

Events & Milestones ○ * Create plan and enroll inter and external department stakeholders
* Establish effective revenue milestones for end of this year as a measure of success

▼ Performance Scorecard

Plan Revenue Target ○	$500,000,000	% Goal Attained	40.00%
Sales YTD ○	$200,000,000		

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▼ System Information

Created By	Senior Executive Manager, 6/17/2014 2:46 PM	Last Modified By	Senior Executive Manager, 6/18/2014 5:26 PM

[Edit] [Delete] [Clone]

🔵 Primary (My) Performance Objectives   [New Performance Objective]   Primary (My) Performance Objectives Help ?

Action	Performance Objective Name	Description	Performance Perspective	Status	Target Goal 1	Active Measure 1	Performance Result 1	% Goal Attained 1	Related Sales Manager Plan 2
Edit | Del	Managing Alliance Partner Contribution to Revenues (Utilities)	See Remarks	Managing Partner Contribution; Managing Stakeholder Relations	Behind Schedule	100,000,000	Total revenue generated by or via alliance partners	50,574,000	50.57	Channel Manager Sales Plan (Utilities)
Edit | Del	Managing Revenue Growth Performance (Utilities)	See Remarks	Managing Business Unit Strategy; Managing Corporate Strategy; Managing Demand Generation; Managing Human Resource Ops.	Ahead of Schedule	500,000,000	% of increase in revenue in a given time period	200,000,000	40.00	Team 'A' Sales Plan (Utilities)
Edit | Del	Managing Sales Best Practice Coverage Performance (Utilities)	See Remarks	Managing Best Practices; Managing Employee Contribution; Managing People & Teams	On Schedule	100	% of key processes that are considered to be best practices	45	45.00	Sales Training Plan (Utilities)
Edit | Del	Managing Sales Compensation & Benefits Benchmark Performance (Utilities)	See Remarks	Managing Employee Satisfaction; Managing Human Resource Ops.; Managing People & Teams	Behind Schedule	92,500	Average sales compensation paid vs. competition / industry & geography	145,000	156.76	Sales Operations Plan (Utilities)
Edit | Del	Managing Sales Force Productivity (Utilities)	See Remarks	Managing Demand Generation	On Schedule	500,000,000	Total increase in revenue in a given time period	100,000,000	20.00	High Level Strategic Business Plan (Utilities)

🔵 Secondary (Shared) Performance Objectives   Secondary (Shared) Performance Objectives Help ?

Action	Performance Objective Name	Description	Performance Perspective	Status	Target Goal 1	Active Measure 1	Performance Result 1	% Goal Attained 1	Related Sales Manager Plan 1
Edit | Del	Managing Training Programs on Sales Performance (Utilities)	See Remarks	Managing Human Resource Ops.; Managing People & Teams	On Schedule	80	Behavioral Change after training - PSES	40	50.00	Sales Training Plan (Utilities)
Edit | Del	Managing New Product / Service Performance (Utilities)	See Remarks	Managing Brand Prod & Svs Strategy; Managing Product & Service Dev.	On Schedule	300,000,000	Revenue generated from existing accounts as % of total revenue	20,000,000	6.67	High Level Strategic Business Plan (Utilities)
Edit | Del	Managing Sales Force Accuracy (Utilities)	See Remarks	Managing Demand Generation	On Schedule	95	% of forecasts that are 100% accurate	65	68.42	Sales Operations Plan (Utilities)

🔥 Related Supporting Goals   Related Supporting Goals Help ?

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📋 Related Management Plans   [New Management Plan]   Related Management Plans Help ?

Action	Management Plan Name	Owner Last Name	Plan Period	Plan Status	Plan Revenue Target	Sales YTD	% Goal Attained
Edit | Del	Channel Manager Sales Plan (Utilities)	Senior Manager	2014	In Development	$100,000,000	$50,574,000	50.57
Edit | Del	Sales Operations Plan (Utilities)	Sales Operations	2014	In Development	$120,000,000	$55,300,324	46.08
Edit | Del	Sales Training Plan (Utilities)	Sales Operations	2014	In Development	$1	$1	100.00
Edit | Del	Team 'A' Sales Plan (Utilities)	Senior Manager	2014	In Development	$6,000,000	$1,824,324	30.41
Edit | Del	Team 'B' Sales Plan (Utilities)	Senior Manager	2014	In Development	$4,350,000	$1,522,000	34.99

🟩 Account Rep Plans   [New Account Rep Plan]   Account Rep Plans Help ?

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Open Activities   [New Task] [New Event]   Open Activities Help ?

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Activity History   [Log a Call]   Activity History Help ?

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Management Plan
High Level Strategic Business Plan (Utilities)

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Primary (My) Performance Objectives [2] | Secondary (Shared) Performance Objectives [1] | Related Supporting Goals [0] | Related Management Plans [2] | Account Rep Plans [0] | Open Activities [0] |
Activity History [0] | Notes & Attachments [0]

Management Plan Detail   [Edit] [Delete] [Clone]

Management Plan Name	High Level Strategic Business Plan (Utilities)	Owner	👤 Senior Executive Manager [Change]
Parent Performance Plan		Plan Period ❓	2014
		Plan Status ❓	In Development

▼ Performance Plan Elements

Go to Market Strategy ❓ This Strategic Business Plan (SBP) establishes the overall framework for sales priorities for 2014 covering objectives, deliverables and performance metrics required to achieve $500M in overall sales. This plan flows downstream to the account level and ties together cross-functional support organizations to unify all related (child) business plans under: sales, marketing, product development, operations and customer support with the following Objectives:
• Understand Current Situation – Review performance of key departments to assess their effectiveness and deficiencies
• Establish Primary and Secondary Objectives – Articulate the goals and objectives that the overall business needs to focus on.
• Define Execution Requirements – Clear and actionable deliverables that will drive day to day activities and priorities to all stakeholders..
• Assess Performance Metrics - Defined sales "tests" to evaluate campaigns and assess their effectiveness at regular intervals.

Risks & Challenges ❓ * Ability to execute internally (Department Leadership)
* Portfolio management execution (Sales Leadership)
* Partner contributions (Alliances and Channels)
* Effective hiring, training and sales planning (Sales Effectiveness)
* Aligning sales quota/pipeline management to account planning (Sales Pipeline Development, Validation and Pursuit)
* Maximizing revenues from key customer accounts (Initial Sales Penetration & Year 2 Account Radiation)

Events & Milestones ❓ * Create plan and engage inter-departmental stakeholders
* Establish revenue and performance milestones tying sales quota to account plans
* Deliver $500M in total sales with $100M in channel sales, $300M into new/existing accounts and $100M services

▼ Performance Scorecard

Plan Revenue Target ❓	$500,000,000	% Goal Attained	40.00%
Sales YTD ❓	$200,000,000		

💬 Chat ⟩

▼ System Information

Created By	Senior Executive Manager, 6/17/2014 5:48 PM	Last Modified By	Senior Executive Manager, 6/24/2014 7:19 PM

[Edit] [Delete] [Clone]

🔵 Primary (My) Performance Objectives   [New Performance Objective]   Primary (My) Performance Objectives Help ❓

Action	Performance Objective Name	Description	Performance Perspective	Status	Target Goal 1	Active Measure 1	Performance Result 1	% Goal Attained 1	Related Sales Manager Plan 2
Edit | Del	Managing New Product / Service Performance (Utilities)	See Remarks	Managing Brand Prod & Svs Strategy; Managing Product & Service Dev.	On Schedule	300,000,000	Revenue generated from existing accounts as % of total revenue	20,000,000	6.67	Executive Sales Manager Strategic Sales Plan (Utilities)
Edit | Del	Managing Overall Organizational Productivity (Utilities)	See Remarks	Managing Customer Satisfaction; Managing Demand Fulfillment; Managing Enterprise Planning; Managing People & Teams	On Schedule	10	Value Added Processing Time / Total Processing Time	4	40.00	Sales Operations Plan (Utilities)

🔵 Secondary (Shared) Performance Objectives   Secondary (Shared) Performance Objectives Help ❓

Action	Performance Objective Name	Description	Performance Perspective	Status	Target Goal 1	Active Measure 1	Performance Result 1	% Goal Attained 1	Related Sales Manager Plan 1
Edit | Del	Managing Sales Force Productivity (Utilities)	See Remarks	Managing Demand Generation	On Schedule	500,000,000	Total increase in revenue in a given time period	100,000,000	20.00	Executive Sales Manager Strategic Sales Plan (Utilities)

🔶 Related Supporting Goals   Related Supporting Goals Help ❓

No records to display

📋 Related Management Plans   [New Management Plan]   Related Management Plans Help ❓

Action	Management Plan Name	Owner Last Name	Plan Period	Plan Status	Plan Revenue Target	Sales YTD	% Goal Attained
Edit | Del	Enterprise Operations Plan (Utilities)	Executive Manager	2014	In Development	$500,000,000	$200,000,000	40.00
Edit | Del	Executive Sales Manager Strategic Sales Plan (Utilities)	Executive Manager	2014	In Development	$500,000,000	$200,000,000	40.00

🟢 Account Rep Plans   [New Account Rep Plan]   Account Rep Plans Help ❓

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Open Activities   [New Task] [New Event]   Open Activities Help ❓

No records to display

Activity History   [Log a Call]   Activity History Help ❓

No records to display

Notes & Attachments   [New Note] [Attach File]   Notes & Attachments Help ❓

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