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Three Ideas to Making Your Annual Sales Plan Successful

All of us work very hard on our annual plans to succeed, even though it's usually not a natural talent of successful sales people – we want to be with customers, not planning. Unfortunately, our hard work is often thrown out the door by the middle of February. Regardless of why you're creating a sales plan for next year and how important it is to your success, how will you make sure the plan is a success? As Mike Tyson said in 1989, *“Everyone has a strategy until they get punched in the face.”*

If you want to guarantee that your annual Sales Plan will be successful, implement the following three ideas:

Recruit an Accountability Partner. In 2003, I recruited accountability partners for every personal goal I had – golf, gym, running, and public speaking. I ended the year in great shape, the lowest handicap of my life, and being the MC at three holiday parties (this was before my professional speaking career and a big deal at the time). It was simple, I asked different friends that were better than me in each area to hold me accountable to each specific goal. The results that year changed everything about how I set goals.

Ask someone you trust to hold you accountable to your sales plan. You've got an awesome vision right now for the year, but you'll have set backs or wild successes that you're not anticipating. You'll need someone to keep you focused throughout the year. Ideally, this will be your direct supervisor, but doesn't have to be. Find someone you trust and who cares about your success and simply ask them to help you succeed next year.

Plan Strategic Review Sessions. I was once told that inspiration has a half-life of six weeks. I don't have much empirical data to prove that statement, but I do have a lifetime of anecdotal evidence to support it. How many New Year's resolutions are still on track at the end of January vs. the end of February?

What if you had a strategic review session on February 1? What if it was done with an accountability partner? Think about the increase in your performance – you'd catch yourself and bring your efforts back to the direction of your goals.

The same dynamic happens with sales plans – you could easily get off track by February. However, a review session every four to six weeks will keep you and your activity on track.



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Create monthly goals. Most sales plans have annual goals as a major part of the plan. Without goals, what's the purpose? A year is a long time and the ability to predict the right goals is a rare skill. However, if you set monthly goals, you can adjust along the way and make sure that you're on track. For example, if you set a goal to do 10 quotes with recurring revenue in January and you actually do 22, then you can adjust the goal up for February. Monthly goals allow you to start fresh every 30 days or so. Regardless of how well or poorly you're performing for the year, you can still focus on the month at hand.

I've concluded that more than 80% of sales plans are useless. Tyson was right – when something comes along and punches you in the face, the plan goes out the window. Writing a sales plan seems to be a mandatory exercise that is required by management, but rarely utilized to improve sales performance. It's frustrating to me because it can be such an effective tool if they're used properly and provide such an edge over your competition.

Try the three tactics above, and give me a call if you encounter a challenge along the way. If you find an accountability partner, hold strategic review sessions every four to six weeks, and create monthly goals, I can almost guarantee a great year for you.

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