



# The 5 Most Important Numbers for 2010 Sales Revenue Planning

The Alternative Board (TAB) DFW  
Business Improvement Workshop  
Friday, Feb. 5, 2010  
Las Colinas Country Club, Irving, TX

Change Perspective.  
Improve Business.  
Enjoy Life.

# Speakers



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# Challenges to Revenue Planning

## 2009 CSO Sales Compensation Survey

- Reps achieving quota down to 52.4 in 2009 from 61.2 in 2008
- 1 in 4 firms expect that less than 50% will make quota in 2009
- Most firms target 70% of sales team to make quota

## Aberdeen Lead Lifecycle Management July 2009

- 16% of total leads deemed sales ready actually close
- Best in Class firms avg 35% YOY increase in annual revenue
  - Middle 50% = 18%
  - Laggards = 6%

## Bid To Win Ratios – Aberdeen 2009

- Best in Class 36%
- Industry Avg 10%
- Laggards 5%

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# Sales Opportunity Stages

Lead Stages	
A	Identified – intend to pursue
B	Contacting – attempting to engage
C	Qualifying – introductory dialogue occurring
D	Engaged – actively discussing opportunities
E	Idle – lost traction, attempting to re-engage
F	Cold – lost traction, not currently pursuing

	Sales Opportunity Stages	Probability	Activity
1	Opportunity ID'd	0%	Potential opportunity identified
2	Idea Discussed	0%	Client confirms issues, challenges, need...
3	Concept Solution Delivered	10%	Written concept submitted to prospect
4	Solution Meeting Complete	20%	Concept discussed; including how and when to begin
5	Full Solution Delivered	40%	Solution submitted, including outcomes, timeline & pricing
6	Solution Validated	50%	Proposal modified if necessary / Resubmitted
7	Verbal Approval	75%	Client decision maker accepts proposal
8	Negotiation of Terms	90%	Contract and SOW in review / negotiation
9	Formal Award	100%	Contract and SOW signed
10	Opportunity Lost	0%	Autopsy / Return to Nurturing
11	Deal Dead or Delayed	0%	Return to Nurturing

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“Qualified Opportunities” in our Revenue Planning Model must be in these stages.

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# What is a Qualified Prospect

- Most sales professionals apply their own unique set of variables
- Discrete data needed for each prospect
  - Identified business need
  - Authority to make buying decision
  - Budget
  - Influencers identified
- *BANT* - Budget Authority Need Timeliness

# Definitions in 3forward's Model

"Required New Revenue" equals converted CYR necessary to achieve annual revenue objective.

"Required Qualified Pipeline" defined as total value of pipeline in the "40% or greater" status

"Required Qualified Pipeline" calculation = Annual Value Closed During Quarter divided by Win Probability

Erosion equals degradation in base revenue – planned or unplanned

Annual Value Converted assumes XX% of sold contract value ultimately invoices

# Starting Point: Goals and Assumptions

## Revenue and Sales Goals (Inputs)

	<i>Revenue Goals</i>	<i>Base Revenue and Erosion Projections</i>		<i>Targeted Win Rates</i>	<i>Revenue Conversion</i>
Year	Revenue Objective	Current Base Revenue	Est. YOY Erosion %	Win Probability	Contract Conversion
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Lowering these percentages 'de-risks' your plan by highlighting the need for greater pipeline. We'll show you how it works.

# Quarterly Forecasting Model

## Pipeline and Quarterly Revenue Projection

				2010						2011					
				Plan Year One						Plan Year Two					
Award Totals	Required Qualified Pipeline (2)	Annual Value Closed During Quarter	Annual Value Converted at Signing (3)	Q1	Q2	Q3	Q4	CYR 2010	2011 Base	Q1	Q2	Q3	Q4	CYR 2011	ABR Base
'10 Q1 Wins	\$15.00	\$3.00	\$3.00	0.38	0.75	0.75	1.13	3.00	0.00					0.00	0.00
'10 Q2 Wins	\$17.50	\$3.50	\$3.50		0.44	0.88	0.88	2.19	1.31	1.31				1.31	0.00
'10 Q3 Wins	\$12.50	\$2.50	\$2.50			0.31	0.63	0.94	1.56	0.63	0.94			1.56	0.00
'10 Q4 Wins	\$20.00	\$4.00	\$4.00				0.50	0.50	3.50	1.00	1.00	1.50		3.50	0.00
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Only required inputs are in Light Green cells.

This is what you believe / need to close in each quarter of the upcoming year. The model calculates the effect of that revenue over the subsequent four quarters.

# Output: Multi-Year Forecast

## Three Year Summary Forecast (Results)

Revenue Projection Plan 2010-2011								
Year	Existing Base Revenue	Erosion	Adjusted Base	YOY Growth Target	Required New Revenue (1)	Projected New Revenue (Table 3)	Pro-forma Forecasted Total Revenue	Variance to Current Year Objective
2010	\$6.00	\$0.60	\$5.40	\$12.00	\$6.60	\$6.63	\$12.03	\$0.03
2011	\$18.40	\$1.84	\$16.56	\$24.00	\$7.44	\$7.63	\$24.19	\$0.18

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These first five cells were your inputs from Goals and Assumptions

These calculations are based on your goals / assumptions and the quarter by quarter revenue you 'forecasted' in the Quarterly Forecasting Model.

This reveals what must be sold and converted to guarantee a positive Variance to the Current Year Objective.

Knowing what must be sold determines how much "Qualified" pipeline you need going into each quarter.

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**Objective of the Model:** Identify what must be sold and converted to guarantee a positive Variance to the Current Year Objective.

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# Revenue Planning Recommendations

- **Shorten sales cycles**
  - Cross sell and up sell existing clients when appropriate
- **Increase deal size**
- **Identify the attributes of a qualified best fit target**
  - Segment and target more accurately
  - Stop pursuing low probability targets
- **Implement lead management technology**
  - Improve sales efficiency
  - Better leads result in shorter, faster, and better quality sales cycles
- **Implement lead nurturing to produce more sales ready leads**

# Questions and Discussion

# Revenue Planning Takeaways

- **Validate and test your 5 numbers**
- **Also calculate your Sales Cycle and Sales Rep Efficiency**
- **Purge your pipeline of dead and unqualified deals**
- **To boost win probabilities...** consider increasing walk away ratio (disqualification %); Three points to measure:
  - Lead qualification
  - Field sales team
  - Proposal team
    - *Post-disqualification decision = Nurture or Reject*
- **Estimate throughput requirements**
  - Divide qualified pipeline by average deal size, sales rep efficiency and proposal team throughput

# Revenue Planning Resources

## Purging Pipeline Tips

- [Time Helps No Sale – How the Pipeline Got Over Inflated](#)
- [Basics for Sales Force Development](#)
- [Escaping Pipeline Purgatory](#)

## Rebuilding Pipeline

- [3forward's Sales Readiness Checklist](#)
- [Finding and Creating Qualified Opportunities](#)
- [Finding Good Leads, Today's Toughest Sales Challenge](#)
- Finding, Creating and Managing Leads – Webinar, Jan 21
- Sales Intelligence and Insights – Webinar, Jan 27

## Benchmarking

- [CSO Insights](#)
- [Sales Benchmark Index](#)

## 3forward's Old School / New Tools directory

- [9 categories of sales and marketing best practices and dozens of downloads](#)

# 3forward Resources

	<a href="#"><u>Sales Readiness</u></a>
	<a href="#"><u>Become a Fan</u></a>
	<a href="#"><u>3forward</u></a> <a href="#"><u>Dan 3forward</u></a> <a href="#"><u>Mattat3forward</u></a>
	<a href="#"><u>Sales Leaders Blog</u></a>
<p>Sales Leader Resources</p>	<a href="#"><u>New Tools Directory</u></a>

OK, I need More  
Pipeline!  
What Can I Do  
Now?



*Change Perspective.  
Improve Business.  
Enjoy Life.*

# New Rules for Lead Generation

The Alternative Board (TAB) DFW  
Business Improvement Workshop  
Friday, Feb. 5, 2010  
Las Colinas Country Club, Irving, TX

# Is This Your Company?

Marketing focuses only on image and branding

Sales responsible for leads

Leads not recorded / tracked in automated CRM

On-going lead nurturing happens rep-by-rep

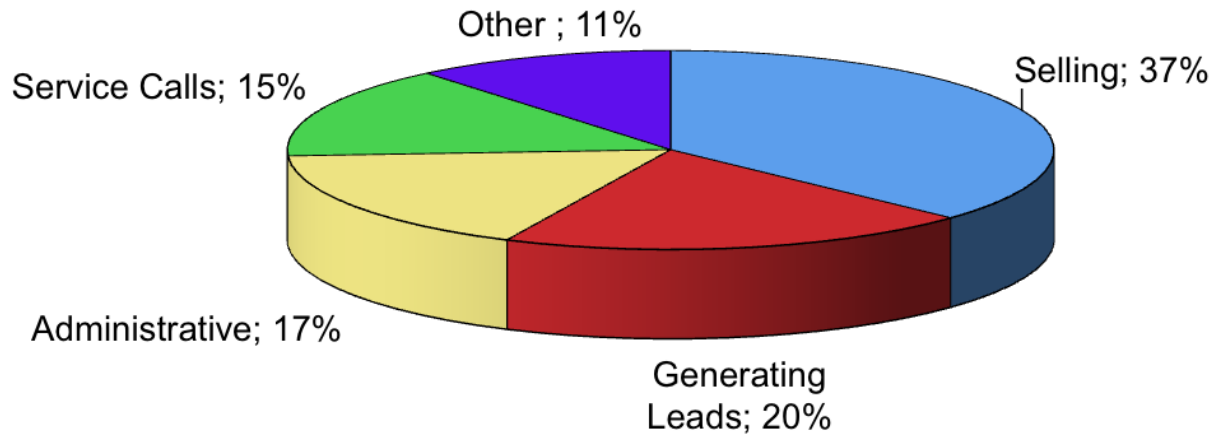
Few or random in-bound lead gen initiatives

Lack of coordinated social media strategy

New data comes only from off-the-shelf lists or on-line aggregators

# Sales Time Not Well Spent

Almost 2/3 of sales time is spent NOT selling!



Source: CSO Insights 2009 Sales Performance Optimization Study

# Lead Gen Goals Haven't Changed

Increasing wins from targeted new logo prospects

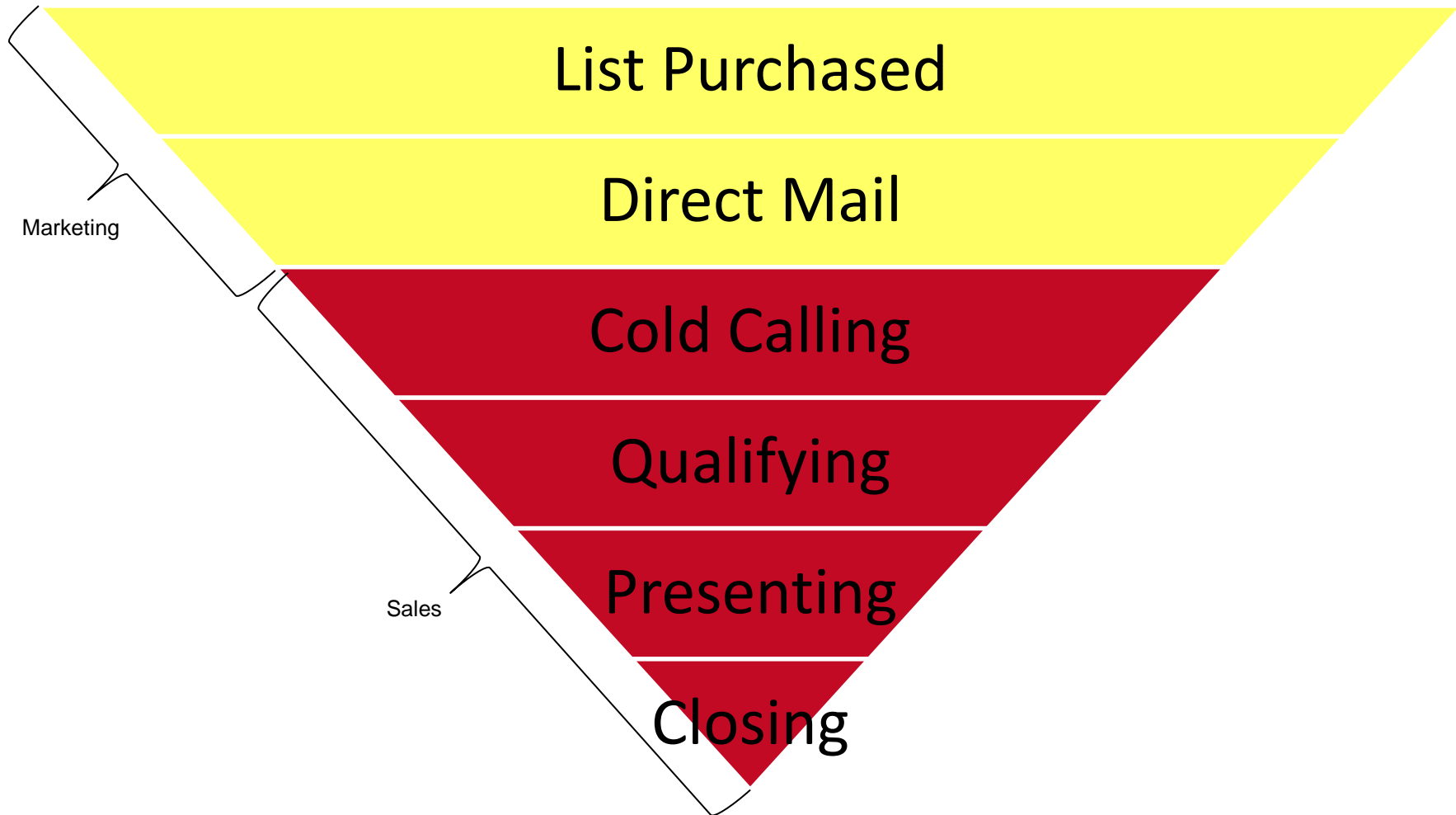
Top of mind with prospects in 'buying mode'

Accelerating in-bound lead generation

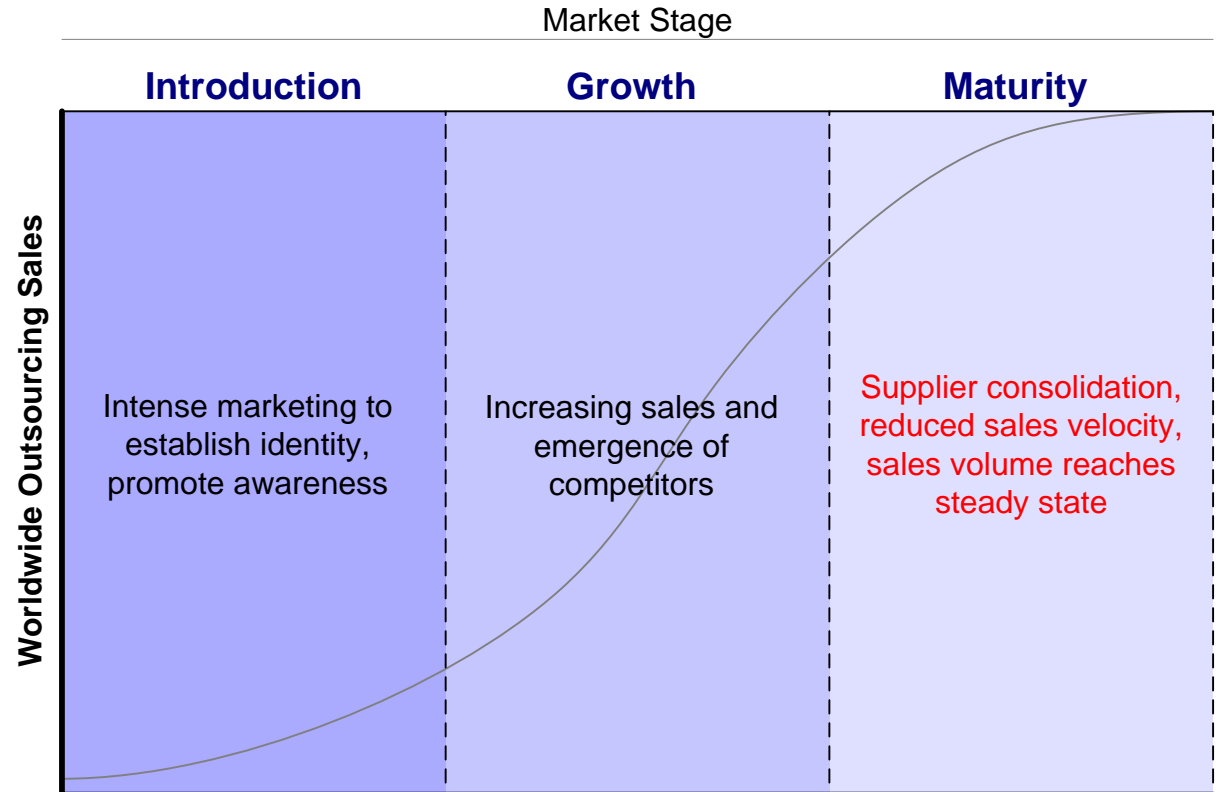
Consistent, sustained lead cultivation

Increasing sales efficiency and reducing cost/lead

# ...Neither Have Most Sales Models



# So Why Don't Old Ways Work



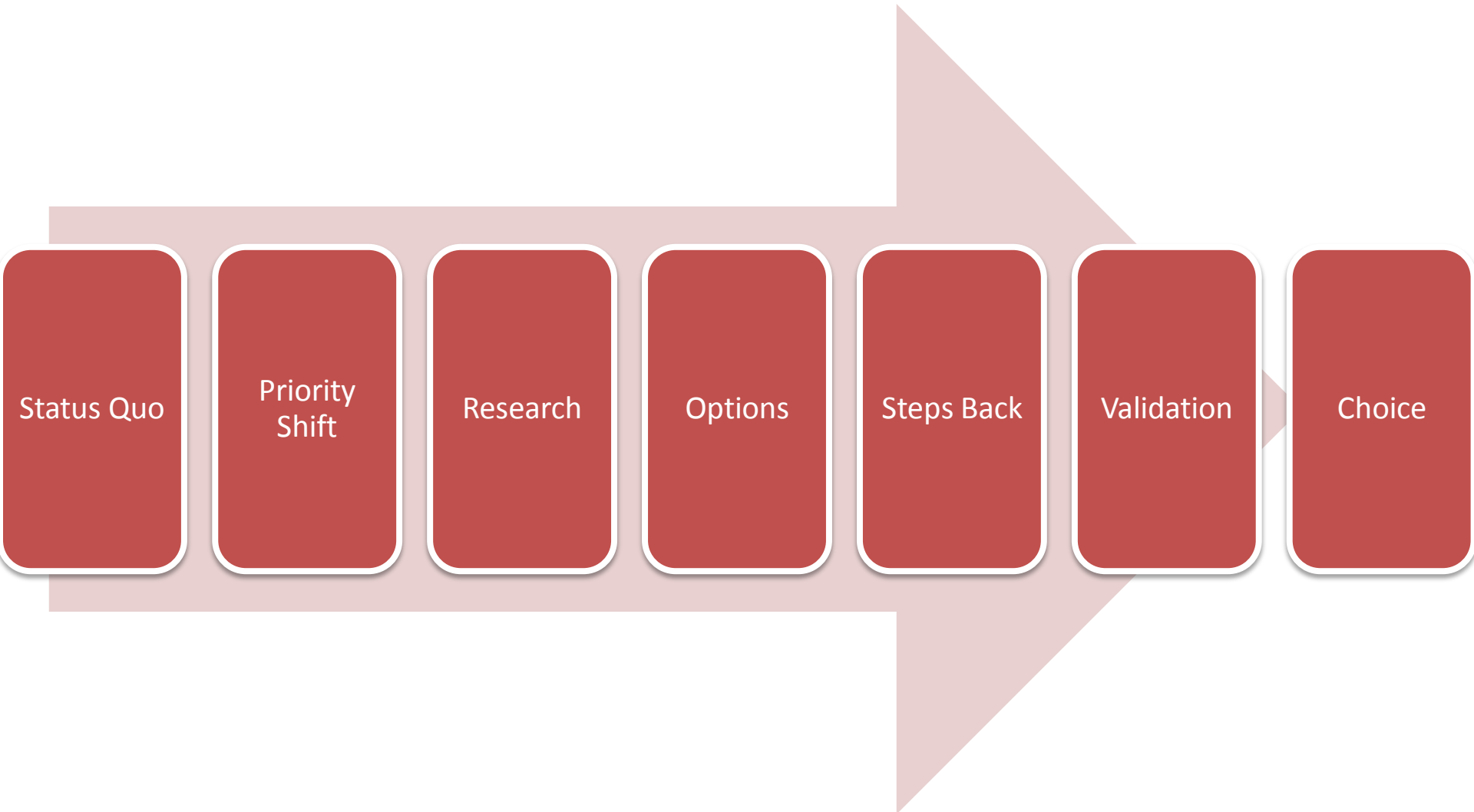
Competition is scarce; success is based on the ability to build awareness and educate prospects on a unique value proposition

Market develops a “gold rush” mentality; success becomes a numbers game where the highest level of hustle wins

Fewer opportunities drive need for “smarter” approach; success based on ability to compete for share using deep account insights and relationships

# Today's Buying Process

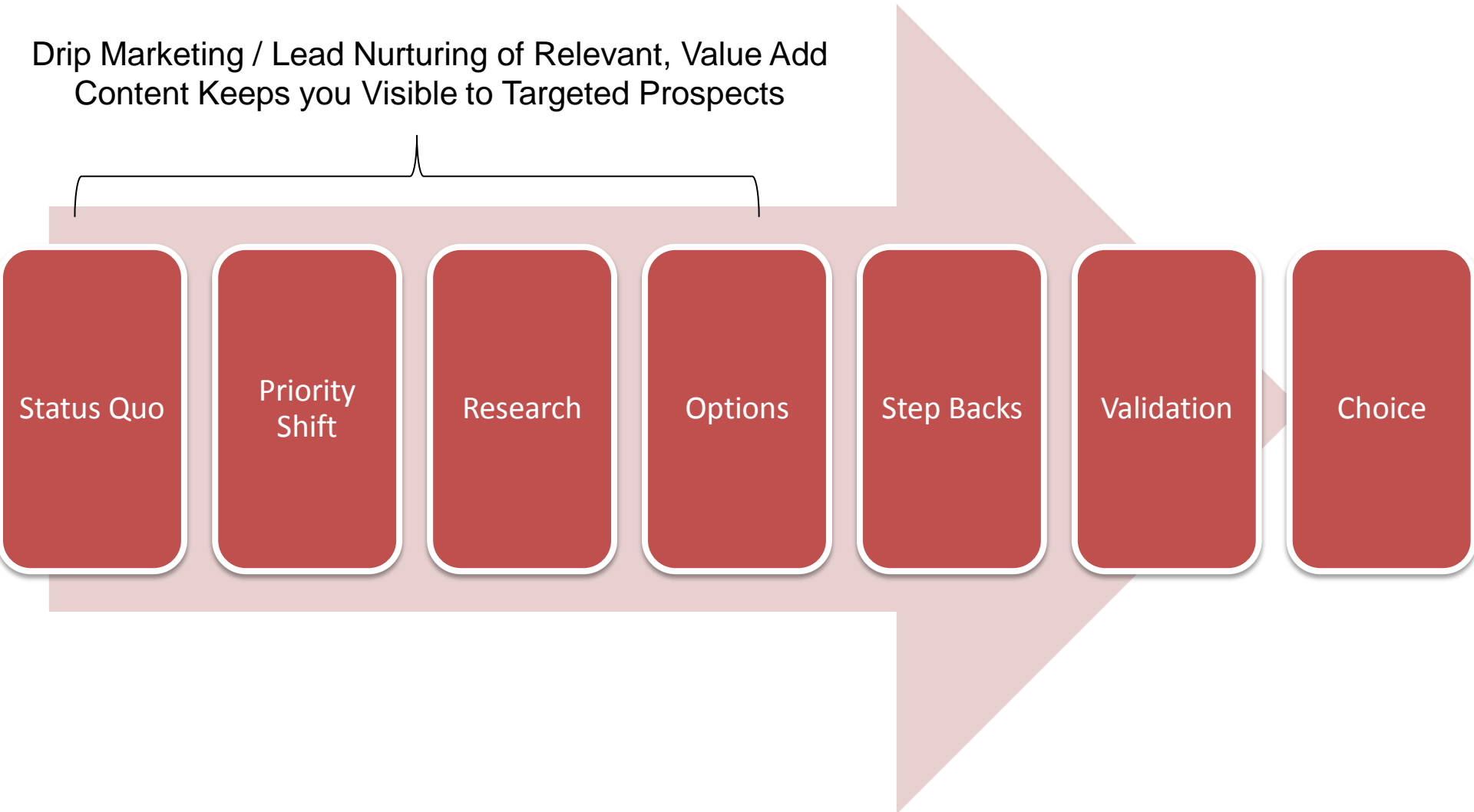
From [Designing Nurturing Programs to Drive Sales](#)©, by Ardath Albee



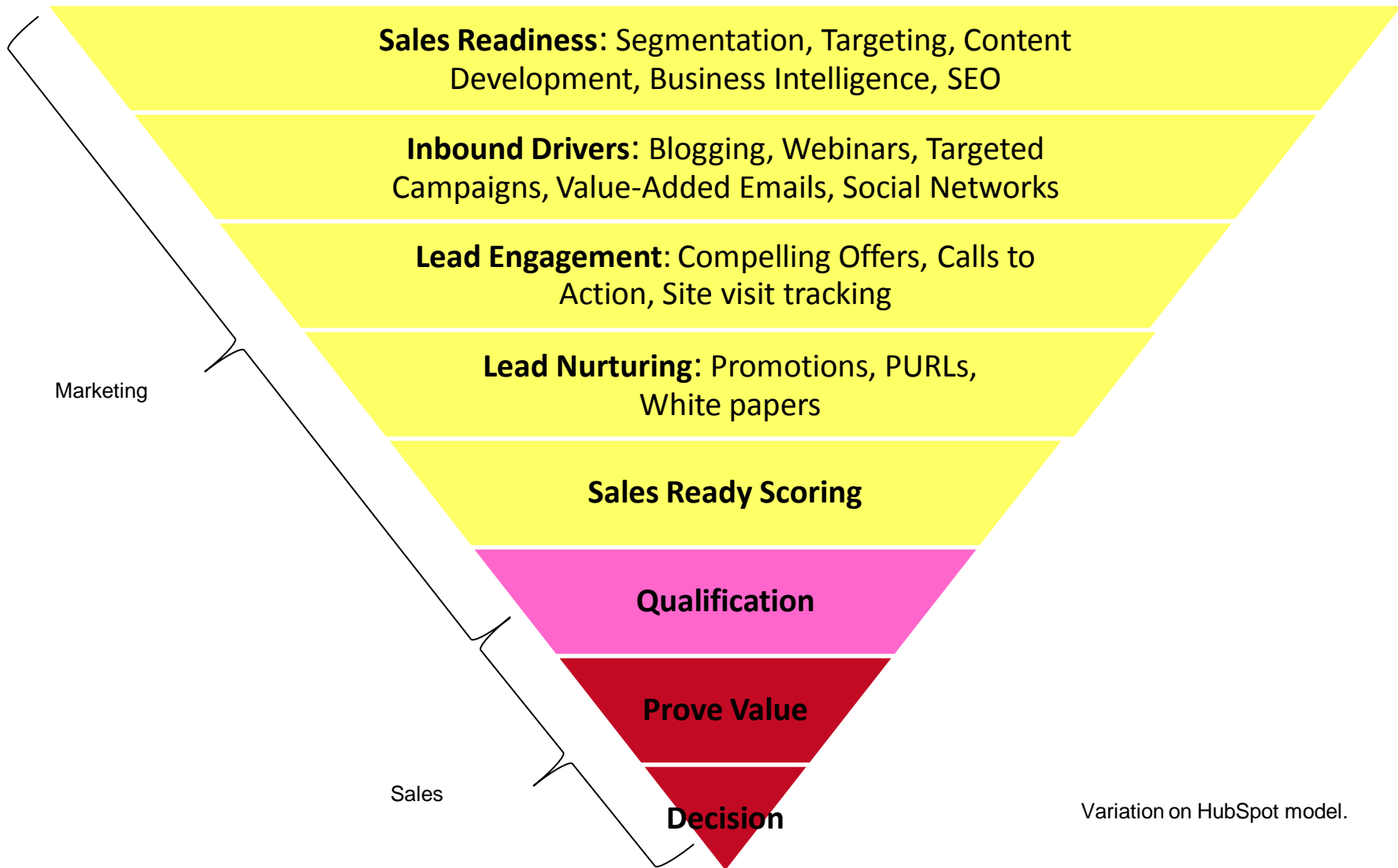
# Today's Buying Process

From [Designing Nurturing Programs to Drive Sales](#)©, by Ardath Albee

Drip Marketing / Lead Nurturing of Relevant, Value Add Content Keeps you Visible to Targeted Prospects



# New Sales Model Needed



Variation on HubSpot model.

# Precise Targeting is THE Starting Point

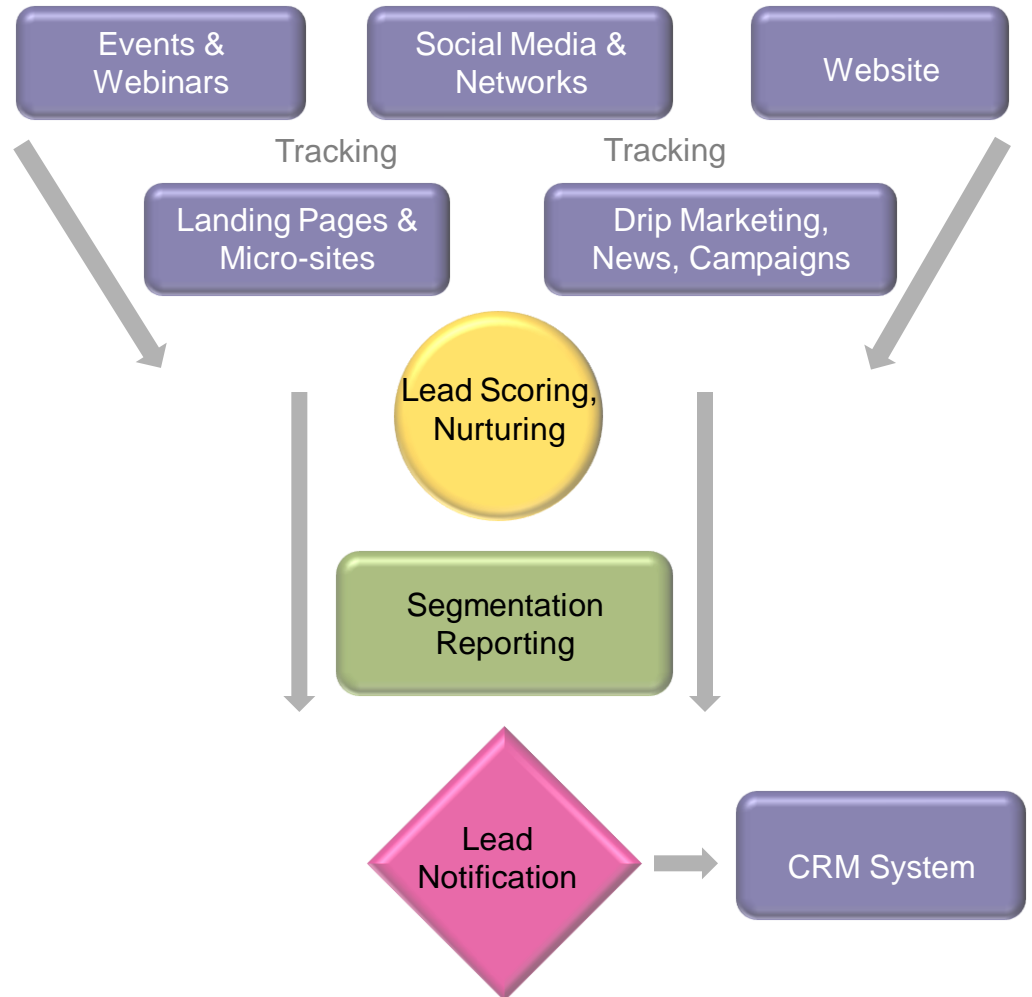
- Define segment(s)
- Establish target client characteristics and attributes – and alternatives (competitive analysis)
- Classify buyer drivers and considerations
- Validate and rank prospect types based on target criteria
  - Separate prospects into Tiers 1, 2, and 3
- Create sales tools such as Sweet Spot Matrix

# Lead Lifecycle Management

## Core Components



## Process and Lead Flow



# Engaging Social Media



Aggressively building the network through mass mailing, teasers on the website, links to social networks from website, inter-network messages etc.

Participate in groups and forums actively interacting about topics related to targeted industry(ies)

Routinely post/tweet/share on all social media accounts about new content, white papers, blog posts etc.

Invite social network/media connections to sign up for subscriptions, newsletters and other updates

Post and publicize videos, video teasers, and webcast videos etc. on social video platforms such as YouTube, Google and Yahoo Videos

Drive traffic to website and landing pages through tweets, announcements, press releases, promotions, forum participation and article submissions etc.

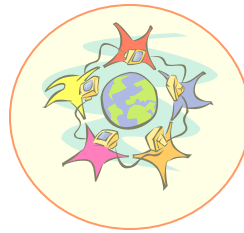
# Social Media Monitoring



*Financial Results*

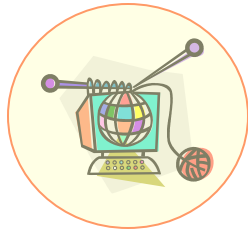
*Relationship Maps*

*Traditional Media*



*Website Tracking*

*Conferences*



# Social Media Monitoring

## Sales Intelligence

- Generating leads
- Tracking competitors
- Identifying industry issues
- Gain key product development insights

### Blog Search Engines

- Technorati
- Google Blog Search
- Bloglines

### Video/Photo Sharing Sites

- Flickr
- YouTube
- Google Video

## Market Knowledge

- Understand trends
- Insights for branding and messaging
- Planning communications
- Measuring campaigns
- Managing reputation

### Social Networks

- LinkedIn
- Facebook

### Industry Press Blogs

- Information Week
- Healthcare IT

## Who To Follow

- Prospects
- Customers
- Influencers
- Suppliers
- Industry Leaders
- Partners

### Microblogs

- Twitter
- Pownce
- Friendfeed

### Wikis

- Wikipedia

Copyright of [Social Media Monitoring](#)

# What Still Applies

Building an Achievable Sales Plan

Exceptional People

Compensation

Sales Process

Acquire and Develop Prospects

Manage Clients and Pipeline for Success

# Old School Meets New Tools...

## - Making It Work -

Marketing and  
Sales Alignment

Shared Metrics and  
Quota

Incentive  
Compensation Tied  
With Sales Goals

Closed Loop Lead  
Management

Commitment to  
Change

# Questions and Discussion

## Sales Readiness Checklist: Lead Generation

- ✓ Marketing and Sales alignment and mutual goals on lead definitions, development, qualification and conversion
- ✓ Research-based assessments of markets and segments
- ✓ Descriptive prospect profiles and analysis
- ✓ Specific and tailored target lists
- ✓ Differentiated value proposition, customized by segment
- ✓ Out-bound and in-bound lead paths (*Social Media is the catalyst here!*)
- ✓ On-going / real-time prospect and target intelligence
- ✓ Managed process to manage creation, development, nurturing, scoring and tracking of leads
- ✓ Clear delineation on when to transition leads to sales
- ✓ Technology to enable and accelerate tracking, automate nurturing and measure effectiveness
- ✓ People engaging prospects to qualify and support through the selling process
- ✓ Reporting and analysis of all program elements / continuous improvement loop

# 3forward Resources

<p>Join Our Group</p> 	<p><a href="#"><u>Sales Readiness</u></a></p>
	<p><a href="#"><u>Become a Fan</u></a></p>
	<p><a href="#"><u>3forward</u></a> <a href="#"><u>Dan_3forward</u></a> <a href="#"><u>Mattat3forward</u></a></p>
	<p><a href="#"><u>Sales Leaders Blog</u></a></p>
<p>Sales Leader Resources</p>	<p><a href="#"><u>New Tools Directory</u></a></p>

# Sales Readiness Series Hosts



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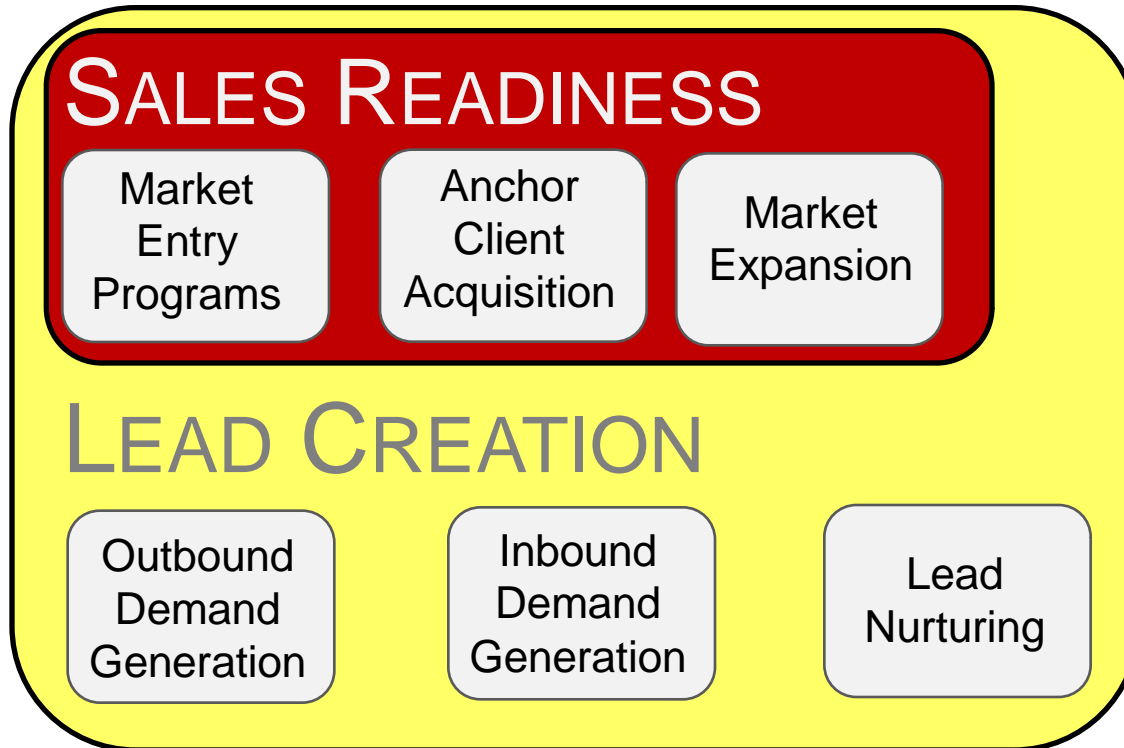
Matt.Smith@3forward.net



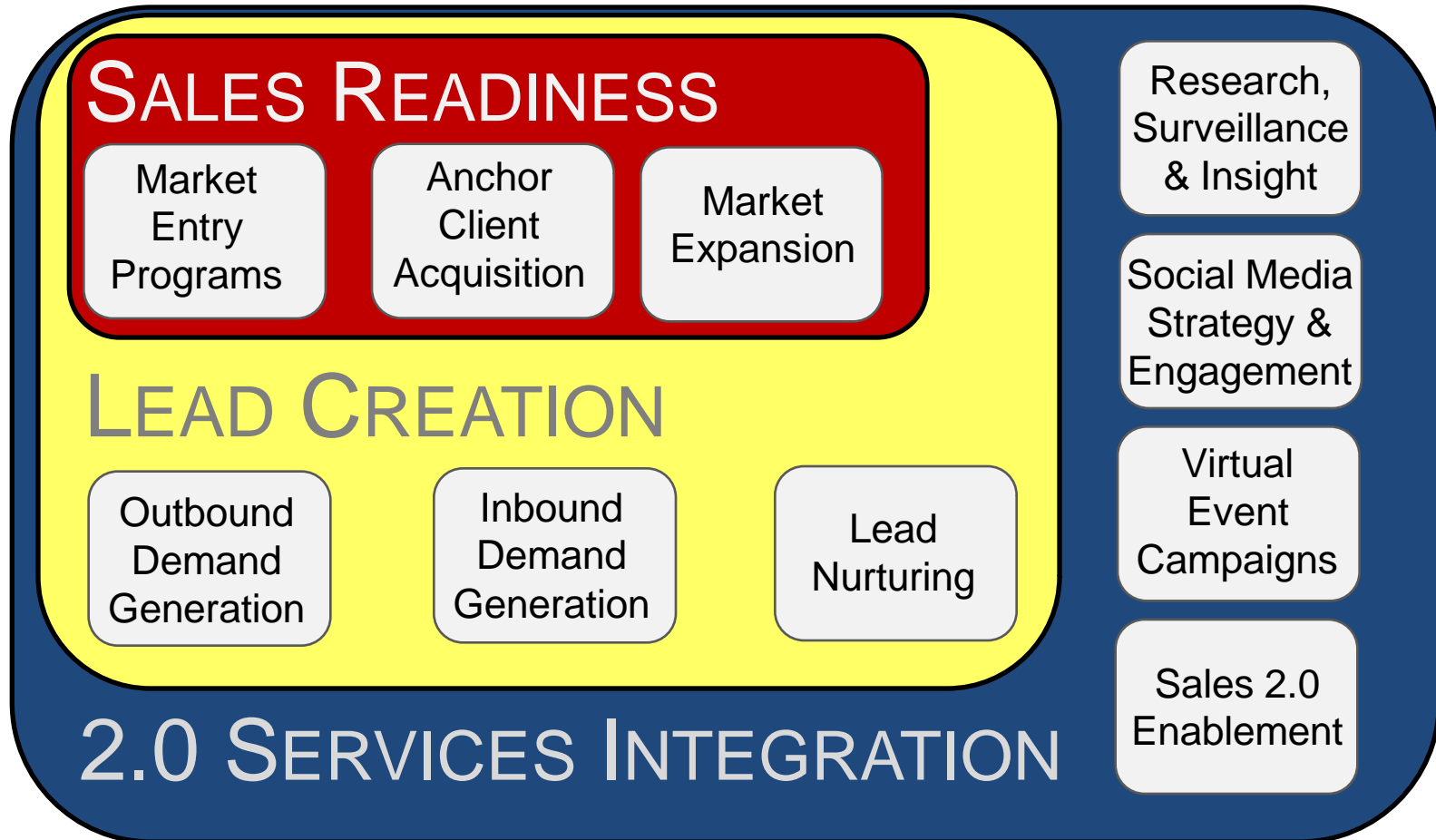
# Sales 2.0 Model

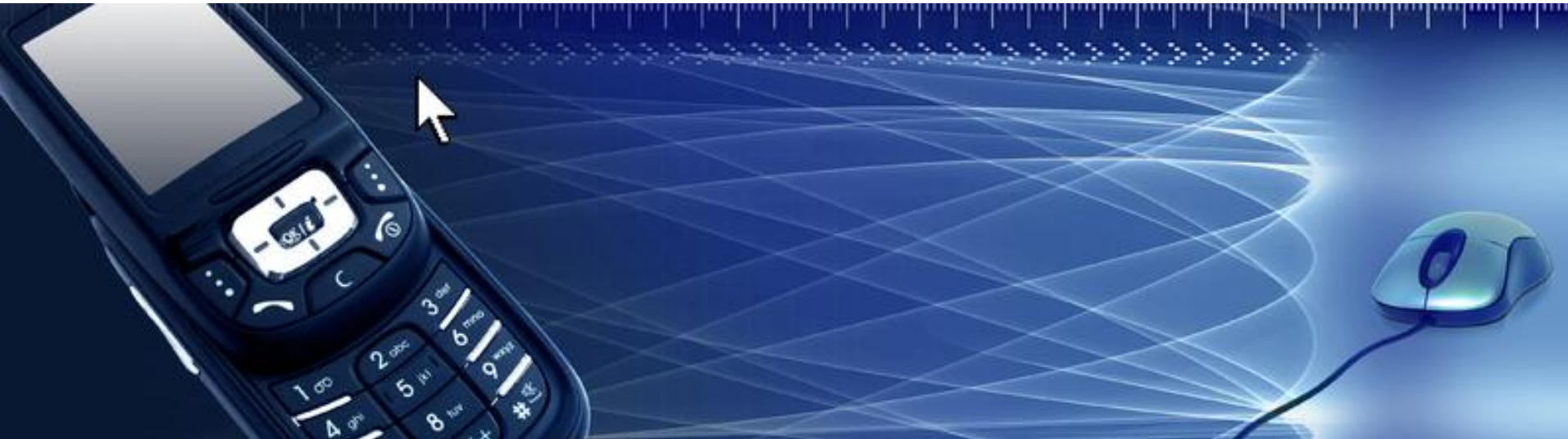


# Sales 2.0 Model



# Sales 2.0 Model





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