

# SALES PLANNING AND FORECASTING **FOR SUCCESS**

*A COMPLETE GUIDE*

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Sales planning is more than just setting revenue targets for the coming year. It is a deliberate process of reflection, preparation, and strategic goal-setting that aligns individual and team efforts with organizational objectives. This process not only establishes a roadmap for success but also fosters accountability, collaboration, and innovation within the sales team. By combining thoughtful preparation with a structured approach, companies can achieve sustained growth and competitive advantage.

The environment in which this planning takes place plays a critical role in its effectiveness. Meetings conducted in an offsite setting, or a carefully prepared space can eliminate distractions and create a sense of focus and energy among participants. Details such as room setup, refreshments, and frequent breaks might seem minor, but they significantly impact engagement and outcomes. When participants feel comfortable, supported, and fully present, the quality of their contributions improves, and the overall planning session becomes more productive.

## IS THIS A WASTE OF TIME?

As Abraham Lincoln famously said, *“Give me six hours to chop down a tree, and I will spend the first four sharpening the axe.”* This wisdom serves as the foundation for effective sales planning. The time invested in reflection, preparation, and collaboration is what sharpens the axe, equipping the team for the challenges and opportunities of the year ahead. Without this preparation, even the most skilled salespeople risk working harder, not smarter.

“ *Planning without preparation is like swinging a dull axe —it takes twice the effort for half the result.* ”



This guide will walk you through the essential elements of sales planning and forecasting, providing actionable insights to elevate your team's performance. From pre-meeting preparation to setting goals, developing strategies, and fostering collaboration, every section is designed to help you optimize your planning process. Whether you're leading a small team or managing a large salesforce, this guide will help you structure your planning efforts for maximum impact.

By the end of this eBook, you'll have a comprehensive understanding of how to lead a successful sales planning session, complete with practical tips for creating an engaging environment, fostering collaboration, and driving results. Let's get started sharpening that axe.

## OBJECTIVES OF A SALES PLANNING MEETING

Sales planning meetings are vital for aligning individual efforts with broader organizational goals. These meetings serve as a platform to set clear objectives, foster collaboration, and identify opportunities for growth. A well-structured session ensures that everyone is working toward shared outcomes while empowering sales representatives to take ownership of their individual targets.

The importance of these meetings goes beyond numbers on a chart. They provide a chance for reflection, planning, and building momentum for the year ahead. Sales planning meetings allow





team members to exchange ideas, refine strategies, and ensure alignment with the company's overall vision. This shared understanding creates a sense of purpose and drives accountability, making the planning process more impactful.

By focusing on three core objectives—goal setting, collaboration, and innovation—these meetings become more than just operational exercises. They evolve into opportunities for growth, fostering a culture of continuous improvement and shared success. Below, we explore these key objectives in detail.

## Setting Clear Goals to Align Efforts

Establishing clear and measurable goals is the foundation of any successful sales planning session. These goals should operate at three levels:

- **Individual:** Sales reps create goals tailored to their strengths and opportunities, ensuring personal ownership and accountability.
- **Team:** Goals that encourage collaboration and the pooling of resources to achieve shared success.
- **Organizational:** Company-wide objectives that connect sales efforts to broader strategic priorities, such as market expansion or revenue growth.

When goals at these levels are aligned, they form a cohesive roadmap for the year ahead. Each representative can see how their work contributes to the team's success and, in turn, how the team drives the company forward. This alignment inspires commitment and keeps everyone focused on a shared vision.

## Stretch Goals as a Tool for Growth

Beyond standard targets, stretch goals challenge sales reps to aim higher and expand their potential. These goals might include securing “big game” clients, revitalizing dormant accounts, or exploring new industries. While stretch goals demand more effort, they also inspire creativity and determination, often resulting in breakthroughs that significantly impact both individual and organizational performance.



**“Stretch goals don’t just measure success; they redefine what’s possible.”**

Stretch goals work best when paired with specific strategies and a clear plan of action. By outlining the steps needed to achieve these ambitious targets, sales reps can approach them with confidence, transforming aspirations into achievable outcomes.

## Sharing Strategies to Foster Collaboration

Sales planning meetings are an invaluable forum for sharing ideas and strategies. Each sales rep brings unique experiences and approaches that can spark new ideas for others. This collaborative exchange enhances the collective knowledge of the team, encouraging everyone to think outside the box.

*“The best ideas aren’t born in isolation—they’re forged through collaboration and shared experience.”*

## Cross-Pollination of Ideas

Team discussions allow for the cross-pollination of ideas, where best practices and innovative approaches are shared openly. For example, one rep might introduce a successful prospecting method that another rep can adapt for their territory. Similarly, feedback from peers can refine strategies, making them even more effective.

Collaboration during planning sessions strengthens bonds within the team, creating an environment where everyone feels valued and supported. This camaraderie translates into higher morale and better overall performance.

## Encouraging Innovation and Continuous Improvement

While reinforcing proven practices is essential, sales planning meetings should also be a space for innovation. The dynamic nature of sales requires a willingness to explore new methods and embrace change. Encouraging innovation keeps the team agile and better prepared to adapt to shifting market conditions.

## Cultivating a Growth Mindset

Fostering a growth mindset involves encouraging experimentation and viewing setbacks as opportunities to learn. Sales reps should feel empowered to test new approaches, knowing that even failures can yield valuable insights. This mindset not only drives creativity but also helps the team stay resilient in the face of challenges. Innovation can take many forms, from adopting new technologies to targeting untapped markets. The key is to balance the reliability of best practices with the boldness of fresh ideas, ensuring that the team continues to evolve and thrive.

## Moving Forward with Purpose

Sales planning meetings are more than operational reviews; they are opportunities to align, inspire, and innovate. By setting clear goals, fostering collaboration, and encouraging continuous improvement, these sessions lay the groundwork for a successful year. When executed thoughtfully, they become a powerful tool for driving individual and organizational growth.

## WHY GROUP PLANNING WORKS

Group planning is a critical element of sales success, offering benefits that go far beyond individual efforts. While one-on-one sessions between sales reps and managers allow for personalized coaching, group planning creates a dynamic environment where ideas are exchanged, strategies are refined, and alignment is achieved. The collective power of a team working together in a structured setting drives innovation, builds trust, and strengthens the overall performance of the sales force.

*“One mind can spark an idea, but a team can set it on fire.”*

The importance of group planning lies in its ability to harness the diversity of the team's experiences and perspectives. By bringing everyone together, organizations can foster peer learning, encourage collaboration, and create a unified approach to achieving goals. Additionally, group planning sessions provide management with a deeper understanding of the sales process and an opportunity to offer targeted support. Below, we explore the key reasons why group planning is so effective.

## Peer Learning and Cross-Pollination of Ideas

Sales planning meetings are a fertile ground for peer learning, where each participant's unique experiences and insights contribute to the team's collective knowledge. Sales representatives often face similar challenges but approach them in different ways, making

these sessions a valuable forum for sharing successful strategies and innovative approaches.

## The Exchange of Best Practices

Group planning allows high-performing reps to share their methods with the team. These best practices could include:

- Techniques for securing meetings with hard-to-reach prospects.
- Innovative ways to nurture long-term client relationships.
- Methods for using tools like CRM systems or social media platforms to drive results.

When these techniques are openly discussed, other team members can adopt or adapt them to their own territories, raising the overall standard of performance. Similarly, junior or struggling reps benefit immensely from seeing how more seasoned colleagues approach their work, learning from their successes and avoiding their pitfalls.



## Building a Collaborative Culture

Beyond individual benefits, this sharing of ideas fosters a sense of camaraderie and mutual respect among team members. Sales can be a competitive field, but group planning shifts the focus from individual competition to collective success. When reps see themselves as part of a collaborative team rather than isolated contributors, it strengthens trust and morale.

## ENHANCING MANAGEMENT'S UNDERSTANDING AND SUPPORT

One of the most significant but often overlooked benefits of group planning is its ability to give management a deeper appreciation for the sales team's efforts. These sessions provide a window into the challenges, creativity, and hard work involved in achieving sales goals.



## Showcasing the Complexity of Sales Work

Sales often looks deceptively simple from the outside—closing deals, meeting quotas, and building relationships. However, the reality is far more complex. Group planning meetings reveal the level of analysis, strategy, and persistence required to succeed. For example:

- Reps might discuss how they tailored their approach to meet the specific needs of a challenging client.
- Presentations often include nuanced analyses of market conditions, competitive dynamics, and shifting customer expectations.

By observing these discussions, management gains a clearer understanding of the sales team's challenges and contributions, which can lead to more informed decisions about resource allocation, training, and support.

## Breaking Down Misconceptions

Group planning also helps dispel common misconceptions about sales teams, such as the idea that their work is less rigorous or more leisurely than other roles. When management witnesses the depth of preparation and strategy involved, it fosters respect and appreciation, which in turn strengthens relationships between departments.



## Fostering Open Dialogue and Innovation

Group planning sessions are a unique opportunity to create an open, interactive environment where participants feel comfortable sharing ideas, asking questions, and challenging assumptions. This dialogue is essential for driving innovation and ensuring that the team is aligned on priorities and strategies.

## Encouraging Creative Problem-Solving

The collaborative nature of group planning sparks creativity. Reps might propose unconventional approaches to longstanding challenges, such as:

- Exploring new markets or customer segments.
- Leveraging emerging technologies to streamline outreach or follow-up processes.
- Partnering with other departments to create more integrated customer experiences.

These discussions often lead to breakthrough ideas that wouldn't emerge in a one-on-one setting, as the collective input and feedback refine initial concepts into actionable strategies.

## Ensuring Alignment Across the Team

Alignment is a critical outcome of group planning. By openly discussing goals, strategies, and challenges, the team can identify and resolve inconsistencies or gaps. For instance:

- A rep's ambitious goal might inspire others to set higher targets for themselves.
- Concerns about resource availability can be addressed collectively, ensuring that everyone has what they need to succeed.

This alignment not only keeps the team focused but also ensures that everyone is working in harmony toward shared objectives.

## THE TRANSFORMATIVE POWER OF GROUP PLANNING

Group planning is more than a meeting—it's a process that transforms a group of individuals into a cohesive team with shared goals, strategies, and inspiration. By fostering peer learning, enhancing management understanding, and encouraging open dialogue, these sessions create a foundation for long-term success.

When done thoughtfully, group planning sessions serve as a catalyst for growth, innovation, and alignment. They remind the team that while sales may be an individual effort at times, achieving ambitious goals is always a collective endeavor.

## Pre-Meeting Preparation

A well-prepared sales planning meeting sets the stage for success. By investing time in the right preparatory steps, both the organization and individual sales representatives can ensure the meeting is focused, productive, and aligned with overarching objectives. Preparation involves equipping participants with the necessary tools, creating an environment conducive to engagement, and fostering a mindset of collaboration and accountability.

**“Preparation turns uncertainty into strategy and strategy into success.”**

The preparation process is twofold. The organization must provide the structure and resources, while sales representatives must do the groundwork to reflect on their performance and craft actionable plans. When both parties fulfill these responsibilities, the meeting becomes a dynamic forum for growth and innovation.

## Preparation by the Organization

The organization plays a pivotal role in ensuring the meeting's success by laying a strong foundation. This includes gathering relevant data, establishing clear expectations, and carefully selecting the meeting environment.

## Providing Historical Data and Analytical Tools

Sales representatives need access to comprehensive data to analyze their performance and identify areas for improvement. The organization should provide detailed reports, including:

- Year-to-date (YTD) revenue comparisons with the previous year or years.
- Three-year revenue trends to highlight patterns and anomalies.
- Projections from earlier in the year, allowing reps to evaluate accuracy and recalibrate for the future.

In addition to data, the organization should create templates or structured prompts for presentations. These templates ensure consistency across individual contributions and help sales reps focus on the most critical aspects of their analysis, goals, and strategies.



## Establishing Guidelines and Expectations

Clarity is essential for a productive meeting. The organization should communicate the purpose of the session, the desired outcomes, and the format for presentations. Key details to address include:

- **Time allocation:** Define how much time each participant has for their presentation and the subsequent Q&A.
- **Content requirements:** Outline the topics each sales rep should cover, such as historical performance, projections, and detailed plans for growth.
- **Participation expectations:** Encourage active engagement, including asking questions and providing constructive feedback.

Providing these guidelines in advance allows participants to prepare thoroughly and ensures that the meeting stays on track.

## Selecting the Right Venue

The physical setting of the meeting significantly influences its effectiveness. Whenever possible, hosting the session offsite is ideal. An offsite location minimizes workplace distractions, creates a neutral environment, and signals the importance of the meeting.

When choosing a venue, consider the following factors:

- **Space and comfort:** Ensure the room is large enough to accommodate all participants comfortably but remove unused chairs to maintain energy and focus.
- **Facilities:** Provide essential tools such as whiteboards, flip charts, projectors, and markers for presentations.
- **Amenities:** Offer refreshments, including coffee, tea, water, and snacks, to keep participants energized. A company-provided lunch creates a welcoming atmosphere and encourages informal networking during breaks.



The venue should be thoughtfully arranged, with clear sightlines for all participants, designated presentation areas, and sufficient space for breakout sessions if needed.

## PREPARATION BY SALES REPRESENTATIVES

While the organization provides the framework, sales representatives must come prepared with insights and plans that contribute meaningfully to the discussion. This requires a mix of reflection, analysis, and strategic thinking.

### Analyzing Historical Performance

Sales reps should begin their preparation by examining their performance data. This involves:

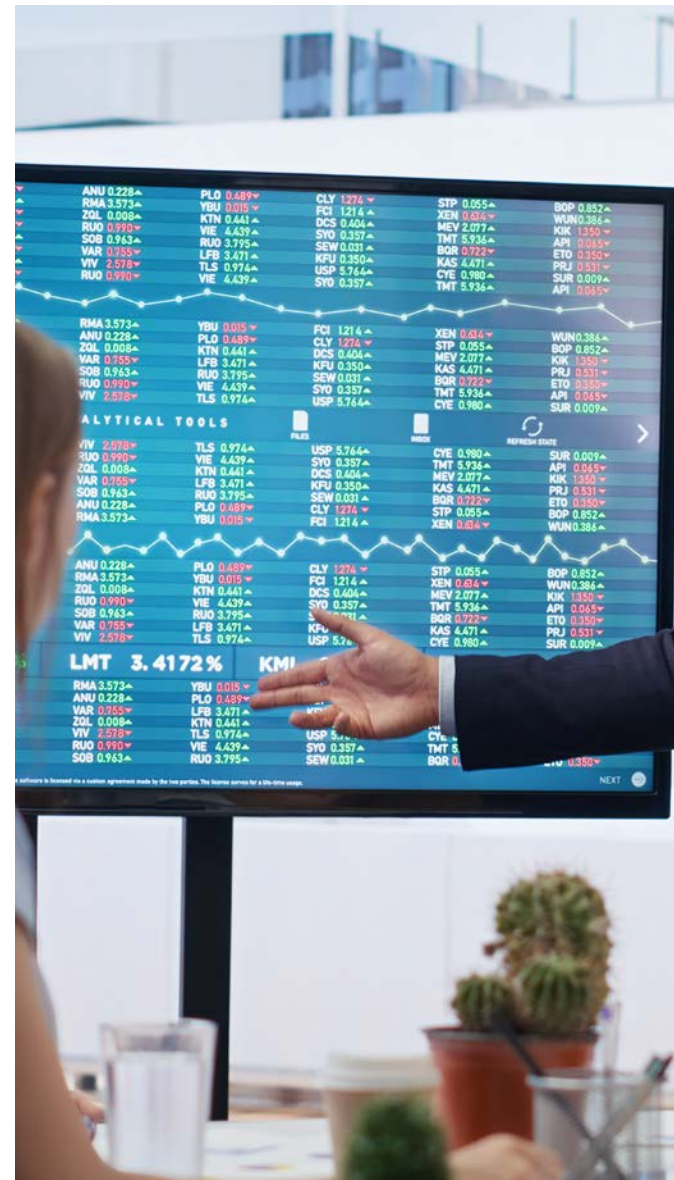
- Comparing year-to-date revenue with the same period in prior years to identify growth or decline trends.
- Reviewing three-year performance patterns to gain a broader perspective.
- Assessing how projections made at the start of the current year align with actual performance.

Beyond numbers, reps should reflect on the factors influencing their performance, such as industry trends, customer behaviors, or internal processes. This context helps identify what worked, what didn't, and why—key insights that inform future strategies.

### Crafting Detailed Plans for Growth

The heart of a sales rep's preparation lies in creating actionable plans for the upcoming year. These plans should address:

1. **Current Accounts:** Identify opportunities to strengthen relationships, increase wallet share, and ensure client retention.
2. **New Accounts:** Develop strategies for acquiring new clients, focusing on target industries or market segments. Reps should outline methods for identifying leads, qualifying prospects, and initiating outreach.
3. **Dormant Accounts:** Evaluate past clients to determine which relationships can be re-



kindled and create plans for re-engagement.

4. **Stretch Goals:** Set ambitious targets, such as landing high-value clients or breaking into new markets, and define the steps required to achieve them.

Each plan should include specific actions, timelines, and tools, demonstrating a clear path to success.

## Preparing for Collaboration and Feedback

Sales planning meetings are not just about individual contributions—they are also about learning and growing as a team. Reps should come prepared to share their insights openly and engage in discussions with peers. This includes being receptive to feedback and ready to adopt or adapt successful strategies shared by others.

## The Role of Preparation in Success

Preparation is the backbone of any successful sales planning meeting. When the organization provides the necessary structure and resources, and sales representatives invest in thoughtful preparation, the meeting becomes a platform for alignment, innovation, and collaboration. By addressing both logistical and strategic elements in advance, the team sets the stage for a productive session that drives results for the year ahead.

## MEETING SETUP

The success of a sales planning meeting depends not only on the content and preparation but also on the physical environment and logistics of the session. A well-thought-out meeting setup can significantly enhance engagement, productivity, and the overall experience for participants. Attention to room layout, amenities, and environmental details ensures that everyone feels comfortable and focused, ready to contribute their best ideas.

### Room Layout

The layout of the meeting room plays a vital role in fostering energy and engagement. Thoughtful design promotes collaboration and minimizes distractions, ensuring that participants remain focused on the goals of the session.

### Comfortable and Purposeful Seating

Every attendee should have a designated seat, arranged to promote eye contact and active participation. Avoid leaving vacant chairs, as these create psychological voids that can drain the energy of the room. Each chair represents a presence, and empty seats can subconsciously signal absence or disengagement. Studies in meeting dynamics suggest that a fully occupied space fosters a sense of purpose and collective effort.



Seating should also support collaboration. Circular or U-shaped arrangements encourage discussion and equal participation, while theater-style rows can be effective for larger groups but should still allow for clear sightlines and interaction.

### **Space for Movement and Breakout Sessions**

Ensure there is ample room for participants to move comfortably. Movement is essential during breakout sessions or activities requiring small group discussions. Separate spaces or designated corners for smaller group work provide flexibility and keep the meeting dynamic. A clutter-free room with clearly defined spaces for different activities helps participants stay organized and engaged.

### **Essential Tools and Technology**

Equipping the room with the right tools is non-negotiable for a successful meeting. This includes:

- Flip charts for brainstorming and visual planning.
- Whiteboards for capturing key ideas and strategies.
- Projectors and screens for presentations.
- Markers, sticky notes, and other supplies to facilitate creativity.

Ensuring that these tools are functional and readily available eliminates unnecessary interruptions and allows the session to flow smoothly.

### **Environment and Amenities**

Creating the right environment goes beyond physical arrangements. The atmosphere of the room must support focus, comfort, and productivity. Small details can make a significant difference in how participants engage and perform.

### **A Comfortable and Energizing Atmosphere**

The meeting room should be well-lit, quiet, and temperature controlled. Proper lighting is critical to maintaining alertness, while a quiet space minimizes distractions. Temperature is equally important; rooms that are too hot or too cold can quickly derail focus and productivity. Striking the right balance ensures participants can stay engaged throughout the session.

### **Refreshments and Breaks**

Providing refreshments demonstrates care for the participants' well-being and keeps energy levels high. Stock the room with coffee, tea, water, snacks, and soft drinks to accommodate different preferences. Healthy snack options, such as fruit or nuts, can sustain focus better than sugary alternatives.

Breaks should be scheduled at regular intervals, approximately every 90 minutes. These short pauses allow attendees to recharge, stretch, and return with fresh perspectives.



Breaks also provide informal opportunities for participants to connect and discuss ideas outside the formal agenda.

### **A Lunch That Connects**

Lunch is an integral part of the day, offering both a physical and mental reset. A company-provided meal allows participants to relax, refuel, and build camaraderie. Whether it's a catered meal in the same venue or a short walk to a nearby restaurant, the lunch break should be unhurried, giving everyone time to enjoy the day and connect with peers.

### **Setting the Stage for Engagement**

A well-prepared meeting setup is more than just logistical—it's strategic. The room layout, amenities, and environment should work together to create a space where participants feel valued, comfortable, and ready to engage. By eliminating distractions and fostering a collaborative atmosphere, the meeting setup becomes a critical enabler of productive discussions and meaningful outcomes.

## **MEETING FLOW AND STRUCTURE**

A sales planning meeting requires a carefully designed flow to maintain focus, foster engagement, and ensure actionable outcomes. By structuring the session into clear, purpose-driven segments, participants can follow a logical progression from reflection to goal setting, strategy sharing, and collaboration. This structure not only maximizes productivity but also keeps energy levels high and discussions on track.

## Opening Session

The opening session sets the tone for the entire meeting. It is the leader's opportunity to articulate the purpose, establish expectations, and create an environment of mutual respect and collaboration.

## Stating Objectives and Outcomes

The meeting should begin with a clear statement of objectives. These objectives may include aligning individual and team goals, fostering collaboration, and inspiring innovative strategies for the year ahead. By outlining these goals upfront, the leader provides participants with a framework to guide their contributions throughout the session.

Additionally, the leader should communicate the desired outcomes. For example, the meeting might aim to produce a consolidated action plan, identify best practices, or inspire stretch goals that challenge the team. When participants understand what success looks like, they are more likely to stay focused and engaged.

*“Great meetings don't just happen—they're orchestrated for momentum and impact.”*

## Setting Ground Rules

Establishing ground rules ensures a respectful and productive environment. These rules might include:

- **Respectful listening:** Allow each participant to present without interruptions.
- **No calls or electronic communication:** we will have frequent breaks.
- **Active participation:** Encourage questions, feedback, and constructive dialogue.
- **Timeliness:** Adhere to the agenda and return promptly from breaks.

We have found that if we allow the participants to be part of setting the ground rules we are able to get much better cooperation in adhering to them, you may want to consider asking the group to set these rather than management imposing them. Ground rules should be simple, clear, and reinforced throughout the session. When participants feel heard and valued, the quality of discussions improves significantly.

## Individual Presentations

Individual presentations are the core of the meeting, providing each sales representative with a platform to share their performance analysis, goals, and strategies. This segment offers invaluable insights into individual and team dynamics.



## Historical Analysis

Each rep begins by presenting their historical performance data, including year-to-date revenue compared to prior years and a review of three-year trends. This analysis should highlight key factors—such as industry trends, economic conditions, or client-specific dynamics—that influenced their results. While this retrospective is important, it should be concise to allow time for forward-looking discussions.

## Projections with a Stretch Goal

Next, the rep presents their revenue projections for the coming year, including a realistic goal and a stretch goal. Stretch goals encourage ambition and creativity, often leading to new ideas and approaches. These projections should be grounded in data and accompanied by a clear rationale.

## Detailed Plans for Achieving Goals

The rep outlines actionable plans to achieve their goals in four key areas:

1. **Current Accounts:** Strategies for retention, growth, and maximizing wallet share.
2. **New Accounts:** Methods for identifying, targeting, and engaging potential clients.
3. **Dormant Accounts:** Approaches for re-engaging former clients and evaluating their potential.
4. **Special Initiatives:** Plans for contributing to broader company efforts, such as cross-functional projects.

Each plan should include specific actions, tools, and timelines, demonstrating a clear path to success.

## Support Needs

Finally, the rep identifies the support they need from management, peers, and the organization. This might include training, resources, or process improvements. By articulating these needs, reps foster a dialogue about how the organization can better enable their success.

## Group Engagement

Following each presentation, group engagement is encouraged to maximize learning and collaboration. This segment creates an interactive environment where ideas are shared, questioned, and refined.

## Encouraging Questions and Feedback

Participants should feel comfortable asking questions and providing feedback after each presentation. This dialogue helps clarify plans, challenge assumptions, and generate new ideas. Constructive feedback not only strengthens individual strategies but also fosters a culture of continuous improvement.

## Highlighting Successful Strategies

Group discussions provide an opportunity to highlight successful strategies and innovative ideas. When reps share approaches that have worked well, others can adapt these methods to their own contexts. This cross-pollination of ideas strengthens the team as a whole and inspires collective growth.

## Frequent Breaks

Sales planning meetings are intensive, requiring sustained focus and energy. To maintain productivity, short breaks should be scheduled approximately every 90 minutes. These breaks allow participants to recharge, reflect, and return to the session with renewed energy.

Breaks also provide informal opportunities for team members to connect, fostering camaraderie and trust. Whether it's a quick chat over coffee or a moment to stretch, these pauses contribute to the overall success of the meeting.

## Creating Momentum

The flow and structure of the meeting are designed to create momentum, moving participants from reflection to action. By starting with a clear purpose, facilitating meaningful individual contributions, and encouraging interactive dialogue, the meeting becomes a powerful forum for planning, learning, and growth. When combined with frequent breaks and thoughtful pacing, this structure ensures that energy and engagement remain high from start to finish.



## KEY COMPONENTS OF AN EFFECTIVE INDIVIDUAL SALES PLAN

A robust individual sales plan is not a one-size-fits-all document. It must be tailored to fit the unique dynamics of the organization, the industry it operates in, and the specific responsibilities of the sales representative. While certain foundational elements remain consistent, the customization of each plan ensures alignment with corporate objectives and maximizes its effectiveness. By creating a plan that is comprehensive, actionable, and adaptable, sales reps set themselves up for success and provide a roadmap for achieving their goals.



“ *A winning sales plan isn’t a document—it’s a roadmap to consistent action.* ”

At its core, an effective sales plan encompasses a combination of reflection, strategy, and resource alignment. Reps must analyze their current portfolio, identify opportunities for growth, and outline clear steps to achieve their objectives. These plans also require forward-thinking components, such as identifying new clients or markets, setting stretch goals, and defining the support needed to realize their vision. This balanced approach ensures that the plan is both practical and aspirational, encouraging continuous improvement and innovation.

While the specific structure of a sales plan may vary between companies, its foundation typically rests on several key components. These include retention strategies for current accounts, methods for acquiring new accounts, approaches to re-engage dormant clients, and specialty areas unique to the organization. Additionally, plans should incorporate long-term stretch goals and a clear articulation of the resources and support required from managers, peers, and the organization to bring these strategies to life. Below, we explore these components in detail.

## Current Accounts: Retention and Growth Strategies

Current accounts are the foundation of any sales portfolio, providing consistent revenue streams and opportunities for expansion. A successful sales plan begins with strategies to retain and grow these relationships, ensuring they continue to deliver value for both the client and the organization.



Retention strategies often focus on strengthening relationships through regular communication, personalized service, and proactive problem-solving. By understanding the specific needs and goals of each client, sales reps can position themselves as trusted partners rather than transactional vendors. Growth opportunities within current accounts might include upselling additional products or services, cross-selling complementary offerings, or expanding into other departments within the client's organization.

Analyzing historical performance data is essential for identifying trends and opportunities. Sales reps should evaluate which accounts are thriving, which are stagnating, and which might be at risk. This insight allows them to prioritize their efforts and focus on actions that yield the greatest return.



## New Accounts: Target Profiles, Research Methods, and Outreach Plans

Acquiring new accounts is essential for sustaining growth and expanding market presence. This component of the sales plan focuses on identifying ideal clients, understanding their needs, and crafting strategies to engage them effectively.

The first step is developing a target profile. Ideal clients might be defined by industry, company size, geographic location, or specific pain points that the organization's products or services can address. With this profile in mind, sales reps can conduct targeted research using tools such as LinkedIn, CRM systems, and industry directories to identify potential leads.

Once potential clients are identified, an outreach plan outlines how to initiate contact and build relationships. This includes choosing the right communication channels (e.g., email, phone, or social media), crafting compelling messages, and determining the cadence and frequency of follow-ups. Effective outreach plans not only generate leads but also establish a strong foundation for long-term relationships.

## Dormant Accounts: Prioritization and Re-Engagement Strategies

Dormant accounts—clients who have engaged in the past but have since become inactive—represent an often-overlooked growth opportunity. Re-engaging these clients requires careful evaluation and targeted strategies to reignite interest.

Prioritization is the first step. Not all dormant accounts are worth pursuing, so sales reps must assess factors such as the account's historical value, the reason for disengagement, and the potential for future growth. High-priority dormant accounts are those that align with the organization's current offerings and have a realistic chance of reactivation.

Re-engagement strategies might include personalized outreach, such as sharing updates about new products or services that address their previous pain points, offering exclusive deals, or highlighting how the company has evolved to better meet their needs. These actions demonstrate the organization's commitment to the client and create opportunities to rebuild the relationship.

## Specialty Areas for Your Specific Organization

Every organization has unique priorities that sales reps must address in their plans. These specialty areas often reflect the company's broader strategic goals, such as promoting specific product lines, targeting niche markets, or supporting cross-functional initiatives. For instance, a technology company might focus on driving multi-year service contracts, while a manufacturing firm might prioritize securing bulk orders. In the earlier example, sales reps were tasked with selling used equipment, requiring plans that targeted specific industries or highlighted the cost-effectiveness of these offerings. Tailoring sales strategies to these specialty areas ensures alignment with organizational objectives and positions the sales team as a critical driver of company success.



## Stretch Goals: Long-Term Strategies for High-Impact Wins

Stretch goals push sales reps to think beyond their immediate targets and pursue ambitious, high-impact objectives. These goals might include landing a marquee client, breaking into a new market, or securing long-term contracts that significantly boost revenue.

Achieving stretch goals requires a detailed plan. Reps might outline steps such as networking with key decision-makers, attending industry events to build visibility, or collaborating with marketing teams to create targeted campaigns. While stretch goals are challenging, they foster creativity, persistence, and a sense of achievement when realized. They also contribute to the organization's long-term growth and stability.

## Support Needs: Defined Requests for Resources and Assistance

One of the most critical but often overlooked components of an effective sales plan is identifying the support needed to achieve its objectives. Reps must clearly define what they require from their managers, peers, and the organization to execute their strategies successfully.

From managers, reps might request regular coaching sessions, assistance with internal challenges, or advocacy for tools and resources that enhance efficiency, such as CRM upgrades or additional training. Organizational support could include providing updated marketing materials, competitive intelligence, or access to data analytics tools that inform decision-making. Collaboration with peers and support staff is equally valuable, whether it's sharing insights, brainstorming new approaches, or handling administrative tasks.

Clearly communicating these support needs fosters a collaborative environment where everyone works together to ensure success. This alignment not only strengthens individual efforts but also reinforces the organization's commitment to its sales team.





## Crafting a Tailored Sales Plan

While these components provide a strong framework, every sales plan must be customized to fit the unique needs of the organization and its sales team. By addressing current accounts, new opportunities, dormant relationships, specialty areas, stretch goals, and support needs, sales reps can create comprehensive and actionable plans. When supported by thoughtful collaboration and targeted resources, these plans become powerful tools for driving success and achieving ambitious goals.

## POST-MEETING FOLLOW-UP

The success of a sales planning meeting extends far beyond the time spent in the room. The real impact lies in how effectively the outcomes are implemented and integrated into the organization's operations. A robust post-meeting follow-up process ensures that the energy, ideas, and strategies developed during the session translate into actionable steps and sustained progress. It also reinforces accountability, encourages refinement of plans, and ensures alignment across all levels of the organization.

Post-meeting follow-up is a shared responsibility among leadership, sales management, and individual sales representatives. Each group plays a distinct role in transforming the meeting's insights into measurable results. From high-level strategic alignment to granular action plan adjustments, this process creates a feedback loop that drives ongoing improvement. Below, we explore the key elements of an effective post-meeting follow-up process.

### Leadership Alignment on Objectives and Expectations

Once the meeting concludes, the leadership team should come together to review the outcomes and ensure alignment with the organization's strategic objectives. This step is critical for bridging the gap between the company's high-level goals and the operational plans developed by the sales team.



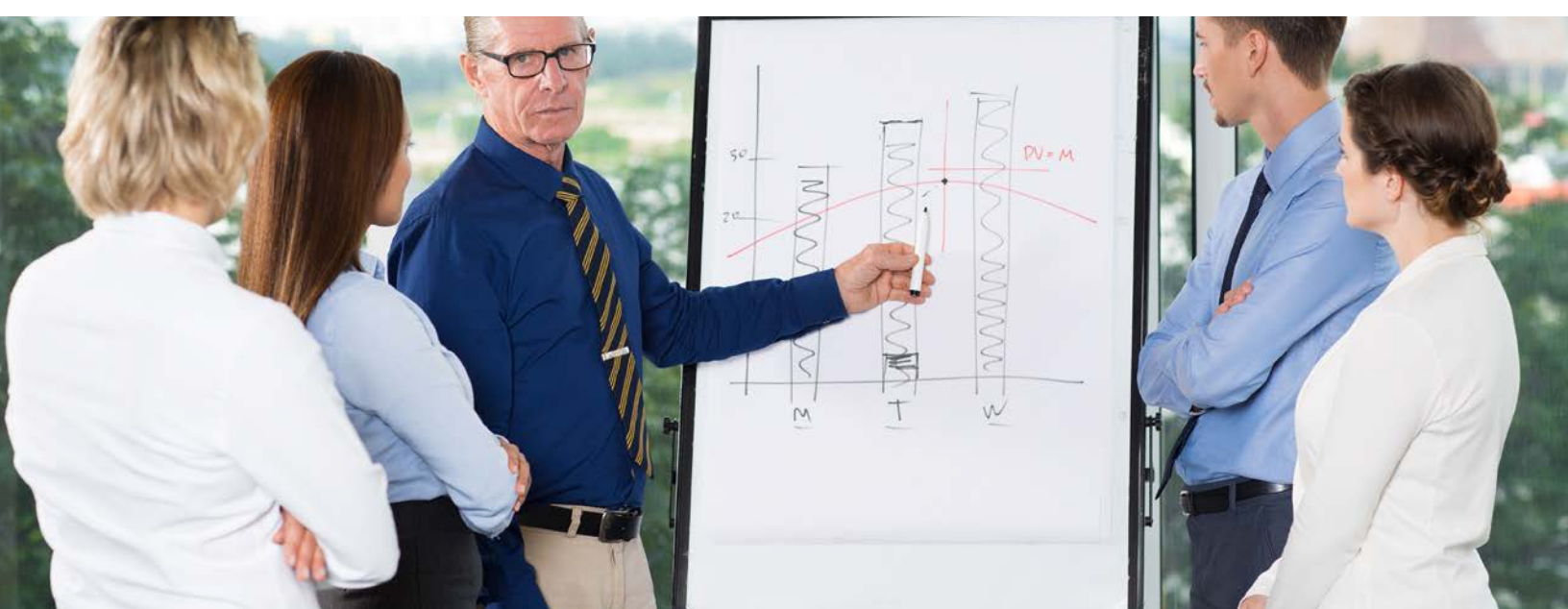
*“The real success of a meeting begins the moment it ends—with action and accountability.”*

## Reviewing Objectives and Projections

**Leadership should assess whether the sales team's goals and strategies align with the broader organizational vision.** Are the revenue projections realistic yet ambitious? Do the strategies support overarching priorities such as market expansion, product launches, or client diversification? By addressing these questions, leadership can confirm that the team is moving in the right direction.

## Identifying Support Needs and Resources

Leadership also plays a key role in addressing the support needs identified during the meeting. This might involve approving investments in training programs, marketing campaigns, or technology upgrades. By proactively addressing these needs, leadership demonstrates their commitment to empowering the sales team and enabling their success.



## Sales Management: Recapping and Socializing Results

Sales management serves as the bridge between the strategic vision of leadership and the tactical execution of the sales team. After the meeting, managers should take the lead in recapping the outcomes, highlighting key insights, and ensuring that the team remains focused on their goals.

### Highlighting Projections and Priorities

One of the first steps for sales managers is to summarize the revenue projections and priorities established during the meeting. This includes both individual targets and team-wide objectives. By communicating these projections clearly and consistently, managers ensure that everyone understands what is expected and how their contributions fit into the larger picture.

## Sharing Great Ideas and Best Practices

Sales planning meetings often generate innovative ideas and uncover best practices that can benefit the entire team. Managers should actively share these insights, highlighting standout strategies and encouraging their adoption across the team. For example:

- A successful method for re-engaging dormant accounts might be turned into a formalized process.
- An innovative approach to prospecting new clients could become part of the team's standard playbook.
- Maybe a recommendation that the marketing department revisit their social media process to fall in alignment with the sales team goals.

By celebrating these contributions, managers not only improve team performance but also foster a culture of recognition and collaboration.

## Sales Representatives: Revising Plans Based on Feedback

For individual sales representatives, the follow-up process begins with revisiting and refining their plans based on the feedback and ideas shared during the meeting. This step is crucial for ensuring that their strategies are as effective and actionable as possible.

### Incorporating Feedback

Reps should carefully review the suggestions and critiques offered during their presentations. Did a peer propose a new approach that could enhance their strategy? Did management highlight areas where their plan could be more specific or ambitious? Incorporating this feedback strengthens their plans and increases the likelihood of achieving their goals.

### Adjusting Projections and Strategies

Based on the insights gained during the meeting, reps may need to adjust their revenue projections or refine their strategies. For example, a rep who initially underestimated the potential of dormant accounts might revise their plan to allocate more time and resources to this area. These adjustments ensure that the plan remains both realistic and aspirational.





## Establishing Regular Check-Ins to Track Progress

Follow-up doesn't end with the revision of plans—it requires ongoing monitoring and support to ensure that progress is being made and objectives are being met. Regular check-ins between sales reps and their managers provide an opportunity to evaluate performance, address challenges, and celebrate successes.



### Tracking Key Metrics

During these check-ins, managers and reps should review key performance indicators (KPIs) to measure progress toward individual and team goals. Are revenue targets on track? Is the pipeline healthy and balanced? Regularly reviewing these metrics keeps everyone accountable and focused on results.

### Providing Coaching and Support

Check-ins also serve as a platform for coaching and support. Managers can provide guidance on overcoming obstacles, offer additional resources, or adjust expectations based on changing circumstances. These conversations reinforce the partnership between reps and their managers and create a sense of shared responsibility for success.

### Transforming Insights into Action

The post-meeting follow-up process is where the real work begins. By ensuring alignment among leadership, providing clarity and direction through sales management, and empowering individual reps to refine and execute their plans, organizations can transform the insights from the meeting into tangible results. Regular check-ins and an ongoing feedback loop further strengthen this process, fostering continuous improvement and driving long-term success.

## ADAPTING FOR LARGER TEAMS

While this eBook is designed primarily for organizations with smaller sales teams of fewer than 12 people, its principles and processes can be scaled effectively for larger companies. In larger organizations, where sales teams may consist of dozens or even hundreds of representatives, it becomes impractical to conduct a single, all-encompassing planning session. Instead, a tiered approach can be implemented,

where smaller group meetings feed into a broader organizational strategy. This structure not only ensures that individual reps are heard but also fosters alignment across departments and teams, culminating in a company-wide Sales Kickoff Meeting (SKO) that inspires and informs the entire sales force.

## Smaller Group Meetings with Sales Managers

For larger sales teams, the first step is dividing the planning process into smaller, more focused group sessions. These meetings are typically conducted by individual sales managers with their direct reports, creating an environment where open dialogue and personalized feedback can thrive.

## Maintaining the Core Structure

Each smaller group meeting should follow the same principles outlined in this eBook:

- Sales reps prepare and present their plans, including historical analysis, projections, detailed strategies, and support needs.
- Managers provide guidance, feedback, and resources to refine individual plans.
- Team members engage in peer learning, sharing ideas and strategies that can benefit the entire group.

By maintaining a consistent structure across all smaller group meetings, organizations ensure that the process remains uniform and aligned with company objectives.

## Building Deeper Connections

Smaller meetings allow for more intimate discussions, enabling sales reps to voice their ideas, challenges, and needs more openly. Managers can focus on individual contributions, ensuring that each rep feels valued and supported. This level of attention is particularly important in larger organizations, where individuals might otherwise feel overshadowed or disconnected from the broader strategy.



## Rolling Up Findings Across the Organization

Once smaller group meetings are complete, the next step is consolidating the insights, strategies, and projections into a cohesive picture. This process typically involves sales managers coming together to review the outcomes of their respective team meetings.

## Collaborating Among Sales Managers

Sales managers play a critical role in this stage, acting as the bridge between their teams and the broader organization. During these follow-up sessions:

- Managers present key findings from their team meetings, including standout strategies, innovative ideas, and potential challenges.
- Common themes and best practices are identified, creating opportunities for cross-team collaboration.
- Projections and plans are evaluated collectively to ensure alignment with organizational goals.

This collaborative approach not only strengthens the overall strategy but also fosters a sense of shared accountability among sales leaders.

## Aligning with Organizational Objectives

As findings are rolled up, it's important to ensure that individual and team plans align with the company's overarching objectives. Leadership should be actively involved at this stage, providing feedback and making adjustments as needed to keep the strategy on track.

## The Sales Kickoff Meeting (SKO)

The final step in adapting this process for larger organizations is a company-wide Sales Kickoff Meeting (SKO). This event serves as the culmination of the planning process, bringing together all sales reps, managers, and leaders to align, inspire, and energize the team for the year ahead.

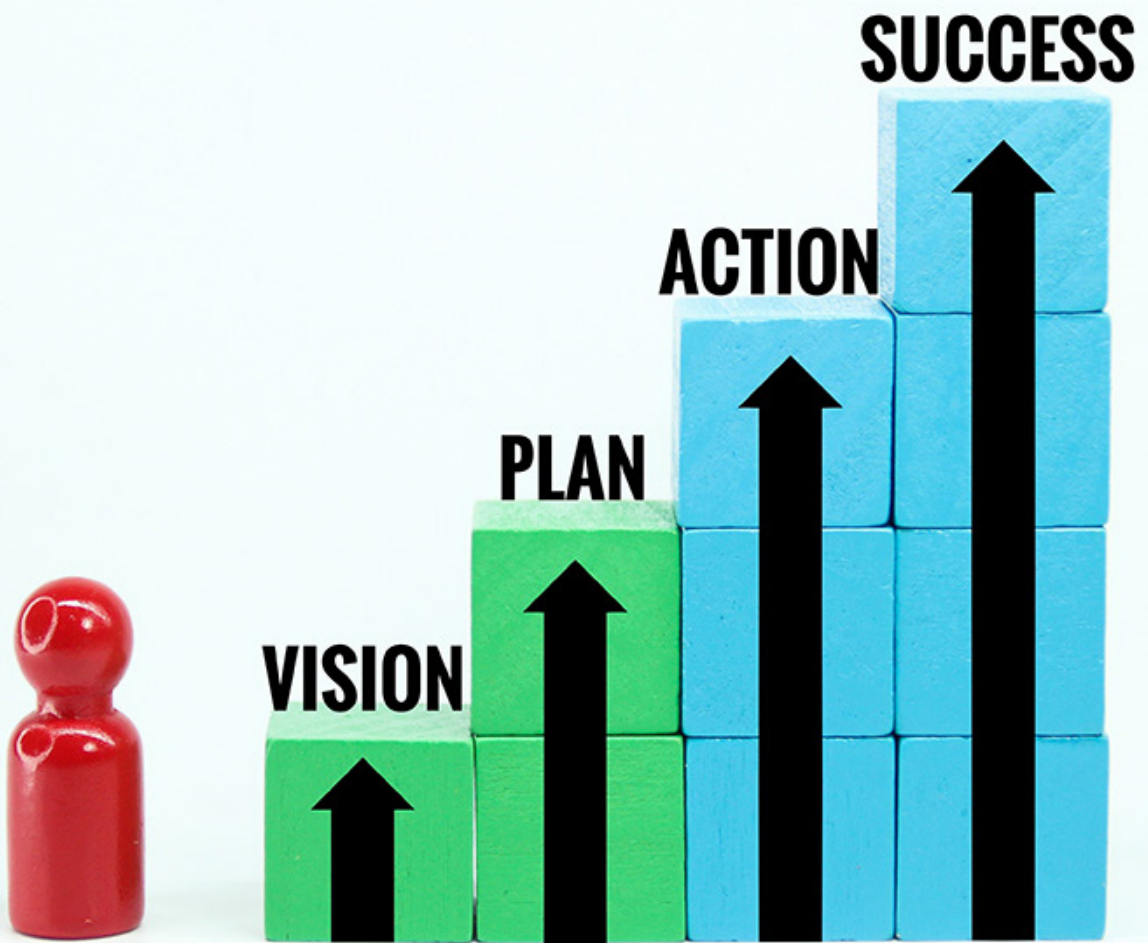
### Setting the Tone and Vision

The SKO provides a platform for leadership to articulate the company's vision, goals, and priorities for the year. This high-level alignment ensures that every member of the sales force understands their role in achieving these objectives.

### Celebrating Success and Sharing Insights

The SKO is also an opportunity to celebrate successes and share insights from the planning process. Managers can highlight standout strategies and innovative ideas that emerged during their team meetings, reinforcing a culture of collaboration and recognition.





### **Inspiring Action and Motivation**

A well-executed SKO goes beyond logistics and strategy—it inspires the sales force. Guest speakers, motivational sessions, and interactive workshops can energize the team, leaving them excited and prepared to execute their plans with confidence.

### **Scaling Success**

Adapting this planning process for larger teams ensures that no individual or idea is overlooked while maintaining alignment and cohesion across the organization. By breaking the process into smaller group meetings, rolling up findings through sales managers, and culminating in a powerful SKO, larger organizations can retain the benefits of this structured approach while leveraging their size to foster innovation and collaboration on a broader scale.

This adaptable structure ensures that companies, regardless of their size, can create sales plans that drive individual success and organizational growth.

## SHARPENING THE AXE FOR SUCCESS

Sales planning meetings are not just events—they are an investment in the success of your team and organization. When conducted with purpose, structure, and collaboration, these sessions provide far more than just a list of targets. They create an environment where ideas are shared, strategies are refined, and the team is aligned toward common goals. The true power of these meetings lies not only in the collaboration and feedback they foster but also in the reflection and preparation that sales representatives undertake beforehand.

The preparation phase is particularly transformative. As sales reps analyze their past performance, set ambitious goals, and map out their strategies, they engage in a process of deep reflection. This introspection allows them to identify their strengths, acknowledge challenges, and draw inspiration from their own potential. The act of preparing a thoughtful, data-driven plan sharpens their focus and builds confidence, providing a solid foundation for execution. When reps take this process seriously, they often discover a renewed sense of purpose and motivation that drives them to perform at their best.

Collaboration amplifies this impact. By bringing together the collective knowledge and experiences of the team, these meetings create opportunities for peer learning and innovation. They foster a culture of accountability, where each team member feels supported and empowered to contribute to the organization's success. For leadership, these sessions provide invaluable insights into the efforts, challenges, and creativity of their sales force, building mutual understanding and trust.

However, the key to unlocking these benefits lies in an organized and systemized approach. Ad-hoc or poorly planned meetings risk wasting time and missing opportunities. Structured, intentional meetings—rooted in clear objectives, detailed preparation, and thoughtful follow-up—ensure that every minute is well-spent and every idea is heard. By creating a repeatable process, organizations can consistently harness the full potential of their sales teams and drive sustained growth.



“Sales success is never luck—it’s the result of sharpened skills, aligned teams, and clear vision.”



As Abraham Lincoln famously said, *“Give me six hours to chop down a tree, and I will spend the first four sharpening the axe.”* These meetings are your team’s opportunity to sharpen their axes, ensuring they are ready to execute their strategies with precision and confidence. When done well, they are not just a planning exercise—they are a transformative experience that prepares your team to achieve remarkable results.

The choice is clear: Invest in these meetings, prepare with intention, and approach them as a vital part of your organization’s success. The time and effort you put into the process will pay dividends in stronger plans, more confident execution, and a sales team that is inspired to reach new heights.





# FURTHER READING & RESOURCES

## Books

Rothwell, W. J. (2015). *Effective Succession Planning: Ensuring Leadership Continuity and Building Talent from Within* (5th ed.). AMACOM.

Charan, R., Drotter, S., & Noel, J. (2011). *The Leadership Pipeline: How to Build the Leadership-Powered Company* (2nd ed.). Jossey-Bass.

De Long, S. (2023). *I Thought I was a Leader... A Journey to Building Trust, Leading Teams, & Inspiring Change*. Lead2Goals.

Conger, J. A., & Fulmer, R. M. (2004). *Growing Your Company's Leaders: How Great Organizations Use Succession Management to Sustain Competitive Advantage*. AMACOM.

Byham, W. C., Smith, A. B., & Paese, M. J. (2002). *Grow your own leaders: How to identify, develop, and retain leadership talent*. Prentice Hall.

Ready, D. A., & Conger, J. A. (2007). *Building a talent factory: Executives and HR leaders collaborate to build a deep, enduring bench*. Harvard Business Review Press.

Garman, A. N., & Glawe, J. (2004). *Succession planning*. Wiley-Blackwell.

## Additional Resources from the Lead2Goals Library

- Support and Accountability
- Leading the Multi-Generational Workforce
- Leadership for the Front Line Manager
- LEAD the Way
- Psychological Safety: The Foundation for High-Performing Teams
- Turning a Group into a TEAM
- Unlocking Influence: The Ethical Path to Leadership Excellence

# SCOTT DE LONG PH.D.



*Alignment isn't accidental—it's the product of clear goals, open collaboration, and shared accountability.*

Scott has had a wide and varied career. He has started, grown, and successfully exited three previous businesses. Has been on several boards serving as a director in both the private and the non-profit sectors. He has a profound commitment to education on both sides of the desk as well as inside and outside of the classroom.

Scott holds a master's degree in Leadership Development and has also earned his doctorate emphasizing in Leadership Studies. Yet with all of that, his primary love is that of teacher and has served as one in a traditional collegiate environment and as a facilitator, coach, and instructor for numerous businesses and organizations.

Scott's strength in leading small group communication allow his to disarm even the greatest of egos, set up an environment of respect, providing the foundation for these groups to quickly build trust. This developed trust ultimately leads to strong interdependent relationships and a new found level of success.

His aspirational goals include continued self-development in three areas he finds critical to leadership; Humility, Empathy and Vulnerability.

Scott's book, *I Thought I Was a Leader... A Journey to Building Trust, Leading Teams & Inspiring Change*, is available at Amazon.com.





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