

Tips, Tricks and Reminders

In October's Tips, Tricks and Reminders we discuss

Account Planning - What you need to know

Why - Why do we need an Account Plan anyway?

4 ways to grow business: - How it works?

Measure it - Using OAR Metrics - What to measure?

This month's **'Skill Shot'** on **Joint Business Plan**

Plus a recommended **Pod Cast, Ted Talk and Book**



Account Planning!



Why do we need an account plan anyway?

The answer is simple...

If you don't have a plan, how do you know if you are being successful?

Someone once explained to me that if you don't plan, how can you tell me what you are **going to do** and if you can't tell me what you are going to do, how can you **get the praise you deserve** for the effort you have put in and when it then comes to your manager allocating **discretionary bonus**, how can you help them decide who should get it – It is easier for a manager to award the bonus to those who, don't just talk a great story, but can show what they planned to do, how they plan to measure what they do and can show the actual results vs the forecast results...

The answer is simple –

1. Plan,
2. Write it down,
3. Measure it ...and
4. Evaluate your performance!



So what does a plan consist of?

A Dream written down with a date becomes a goal

A goal broken down into steps becomes a plan

A plan backed by actions becomes reality

Greg S. Reid

So think about what you want to change -

If it were perfect, what would it look like?

What needs to be done to get there?

Break down the parts of the job into tasks and allocate a time to complete each

Turn your dream into a reality.

Ask yourself:

Out of 10 - how likely are you to focus on this plan...

because **a plan without ACTION**

... is just a dream!



What are the right things to measure?

What gets measured gets done!

What are the key things which deliver the results you need - is it :-

Calls made,

Products

Lines listed,

Number of active customers etc

– whatever it is you need to take time to understand it

Measure the base line [what is it now?]

Next step is to understand what you would like the numbers to move to

The third step is understanding what will cause the changes you require.

There are ONLY 4 ways to grow a business

Trade, Trade-Up, Trade Again and Efficiency

1. Trade

Get a new customer to buy or product introduced

2. Trade Up

Get the buyer to buy more or spend more

3. Trade Again

Get the customer to come back more frequently,
one more than the last measured period

4. Efficiency

Take cost out of the operation, deliver, unload, pay –
slicker or quicker

So, what are the key operational measures for you and your particular customers?

What gets measured gets done

Use the O-A-R metric

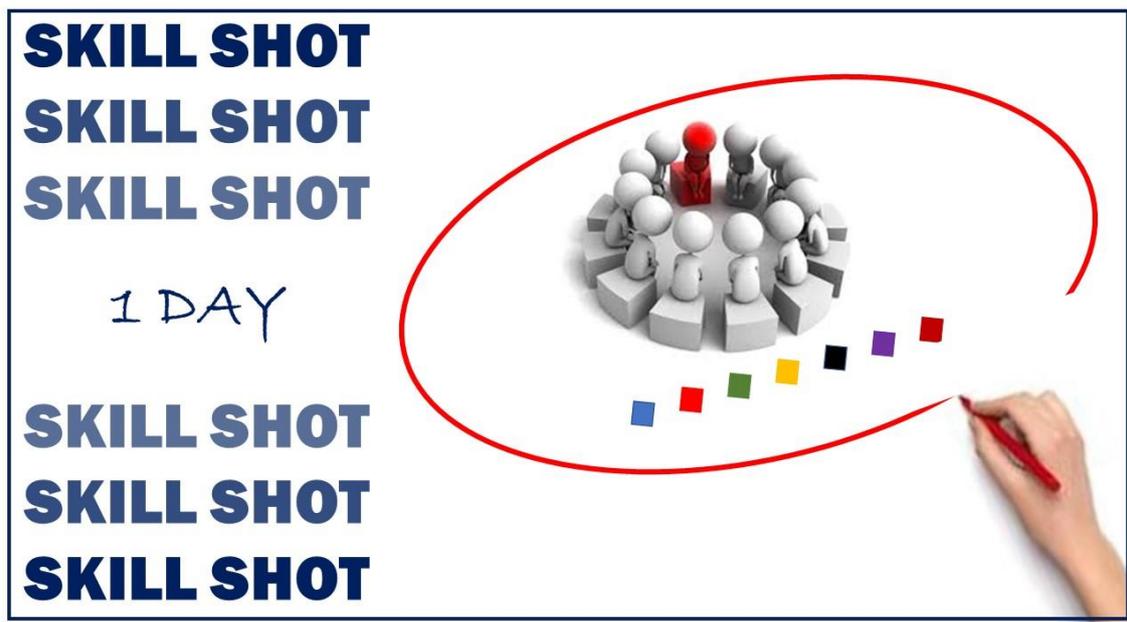
What is it?

This is a simple idea - Identify the **results you want**, select the **objectives** which will most directly affect those results and then chose the **activities that will most directly influence those objectives**. Now measure the activities and the impacts on the Results, refine where necessary.

As you change the focus of your results, so you can change the O-A-R metric, change the activity and the results will change too.

Read more and see an example [here](#)

You can concentrate your time on any of the available metrics, but you can see [\[in the example\]](#) that some have less impact than others. Once you have set yourself a clear **SMASH** objective, it is easier to look at each of the Activities to see which will have the desired RESULT



'Skill Shot'

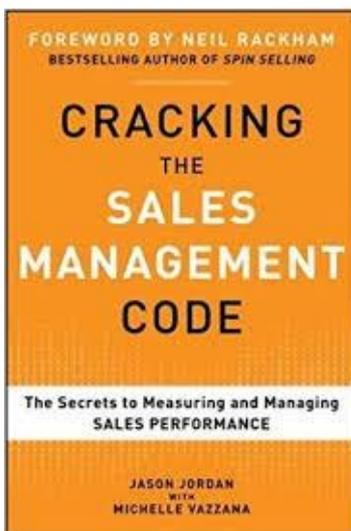
This months Focus is:-

Building a Joint Business Plan

During the day the following subjects will be explored: -

- The process
- How to understand where you want to end up
- How to plan an action orientated JBP
- What to put in and what to leave out
- How to measure progress.
- How to sell the plan internally and externally

[Click here for more Information](#)



The Book Club

Cracking the Sales Management Code

by Jason Jordan and Michelle Vazzana

Cracking the Sales Management Code reveals that science and gives practical steps to identify the metrics you must measure to manage toward success.”

Based on extensive research into how world-class companies measure and manage their sales forces, Cracking the Sales Management Code is the first operating manual for sales management. In it you will discover:

The five critical processes that drive sales performance

[Paper Back](#)

[Kindle](#)

Our Podcast of the month is:-



Business Daily

Business Daily Manuela Saragosa and Ed Butler from the BBC explains - and unravels -

The daily drama of money, work and the World.

Why not listen to it [here](#) ?

This months suggested TEDTalk



According to *Tim Urban* - We can all achieve more -
Inside the mind of a master procrastinator

In this short, fascinating talk, *Tim Urban* shares some secrets about why procrastination happens, the **rational decision maker**, the 'instant gratification monkey', the **panic monster** and the impact deadlines either externally or internally set have on our ability to achieve.

Does this ring any bells for you?

How can you change and achieve more in your life? **See what you think.** [Try it here](#)



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