



## SALES OPTIMIZATION PROGRAM: PLAN AND COMMUNICATION

The Kaiser Companies Sales Optimization Program utilizes seven steps to thoroughly review, analyze and identify all opportunities that can be changed or improved to provide maximum results. The seven steps are part of our Strategy Analysis, Validation and Evaluation (SAVE) methodology we employ to gather valuable information, make recommendations and implement solutions.

Kaiser Companies experienced partners understand the values associated with proper sales planning and communications. Our philosophy is to “plan to win”. Once the sales plan is completed for a given year, success hinges on how well the plan’s objectives are communicated to all constituents impact the plan.

The final step in the Sales Optimization Program involves empowering your organization through effective planning and communication. Our thorough analysis and review processes provide the foundation needed to define an achievable sales plan that produces results. This phase of the Sales Optimization Program is where the expert advice provided by Kaiser Companies evolves from strategy to tactics. We will work closely with the sales management team to:

- Develop an optimal sales plan for forthcoming year
- Provide reporting structure to actively measure and review progress
- Craft an effective communications strategy
- Facilitate meetings with management and staff to improve performance

Sales planning begins by marrying marketing objectives with revenue goals. The sales team has the direct responsibility for all revenue-generating activities. They are the pipeline that enables a company to realize their vision. As a very wise person once said, “You don’t have anything until you sell something.” We help detail a step-by-step process with all associated activities that accurately show how new business will be acquired and existing customers will be retained.

The sales plan is further defined by the numbers. We work with the sales management team to capture the metrics and goals for the forthcoming year. It is essential that sales clearly understands how they will make and/or exceed sales quotas, their performance requirements and how territories are defined. There must also be a precise definition of targets and how sales will raise awareness in the marketplace.

One of the key features of the sales plan outlines projections against targets. Kaiser Companies works with our clients to accurately forecast performance through quantifiable activities. A cautious review of all assumptions will be analyzed to reduce risks and eliminate “misses”. Plan objectives are weighted toward activities with the greatest profit margins to ensure sales are aligned to the organizations financial goals.

A plan must be constantly assessed so adjustments can be made regularly to ensure goals are achieved. Flexibility is an essential attribute to a smart sales plan. A strategy and process for measuring success will be implemented so the sales management team can act responsibly and proactively. We review and define the proper reporting structure with an emphasis on daily, weekly and monthly monitoring. A sales team can only act when they have insight. There must be complete transparency in reporting and performance. We train key personnel how to recognize trends and potential risks. We help sales personnel understand how to overcome the potential obstacles that impede performance.

Once the plan is constructed, Kaiser Companies works with our clients to effectively articulate the roles and responsibilities of all those impacted and participating in the sales plan. A communication strategy is customized to the needs of the organization with a focus on face-to-face team and individual meetings, training and senior level management delivering key messages on expectations and desired results.

For more information about the Kaiser Companies Sales Optimization Program, contact us at 602.792.6100 or email us at [partners@kaisercompanies.com](mailto:partners@kaisercompanies.com).