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90 DAY PLAN

A guide to making an impact in your new sales role

CONGRATULATIONS ON YOUR NEW ROLE

- This PowerPoint has been built to make the best impact in your first 90 days and plan for your future successes.
- This template has been designed to align with the first three phases of your new role.
  - 30 days = Discover
  - 60 days = Review
  - 90 days = Action plan

We wish you the best of success in your new role and hope this plan provides some support and inspiration.

FIRST 30 DAYS - DISCOVER

- Meeting your team/s and get to know their roles – understand your company ecosystem – marketing, customer service, finance and partners – identify key stakeholders and routes to market.
- Identify the customer life time value, customer acquisition cost, net promoter score etc. Do you have the tools to be able to calculate key performance metrics / KPIs and is this information easily accessible?
- Understand your teams performance – in terms of achievement against targets, activity levels, conversion of pipeline to revenue.
- Understand what sales methodologies are being used if any. Are they appropriate?
- Onboarding – access to systems or resources needed for your role: Can you find current active customers? Sales dashboards? Contracts? Proposals? Sales order processing? Meeting reports? Etc.
- Understand your go to market strategy.

30-60 DAYS - REVIEW

- Understand the business objectives and how sales contributes towards them.
- Review individual sales targets, territory splits across the team.
- Review the customers currently in your territory. Who are your key targets? Talk to/meet existing customers.
- Get to know your target ‘personas’ and the buying cycle.
- Review marketing materials, messaging and sales enablement tools available.
- Identify key elements to include in your sales plan and book time with the marketing team to ensure alignment.
- Identify areas of improvements: performance review for staff mentoring, sales processes, customer experience etc.

60-90 DAYS

The below are just ideas feel free to replace with your own targets…

- Make recommendations to address identified improvement opportunities. Who are you going to need to bring on board?
- Review systems such as CRM, and sales order processing – do you have end to end demand funnel visibility?
- Review what reporting/dashboards you have available to track KPI and make informed decisions.
- Define the right objectives for your team to drive success and if necessary adjust team structure to support execution.
- Test your team on the ability to deliver the value proposition, sales pitch, key questioning and product knowledge.
- Identify future investment needs and consider the business case.

Sales Checklist

- ✓ Customer database – how is this managed?
- ✓ Order Processing – understanding the full journey from lead to cash (including approvals, discounting, lead times and quoting)
- ✓ Invoicing
- ✓ Sales and marketing alignment how do these two areas work together?
- ✓ Sales support / Business development programs
- ✓ Reporting and Metrics
- ✓ Sales processes
- ✓ Internal meeting cadence – sales meetings, QBRs, etc.

GOOD LUCK!

If you have any feedback on this deck we would love to hear it.

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