

plan2win

# Territory and Account Planning

*Get the most out of the potential in your  
territory and strategic accounts!*



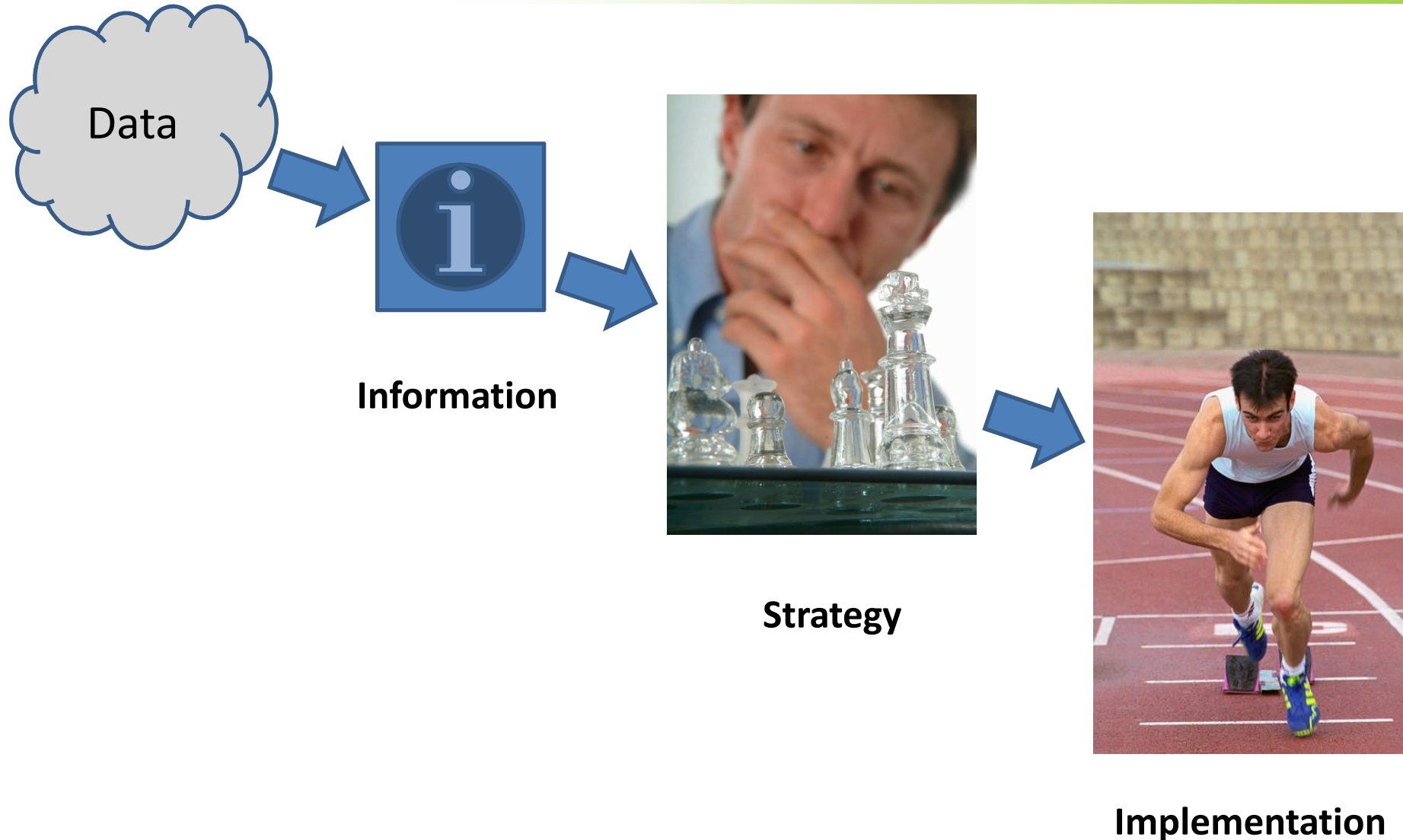
salesforce.com®  
ISV Application Partner

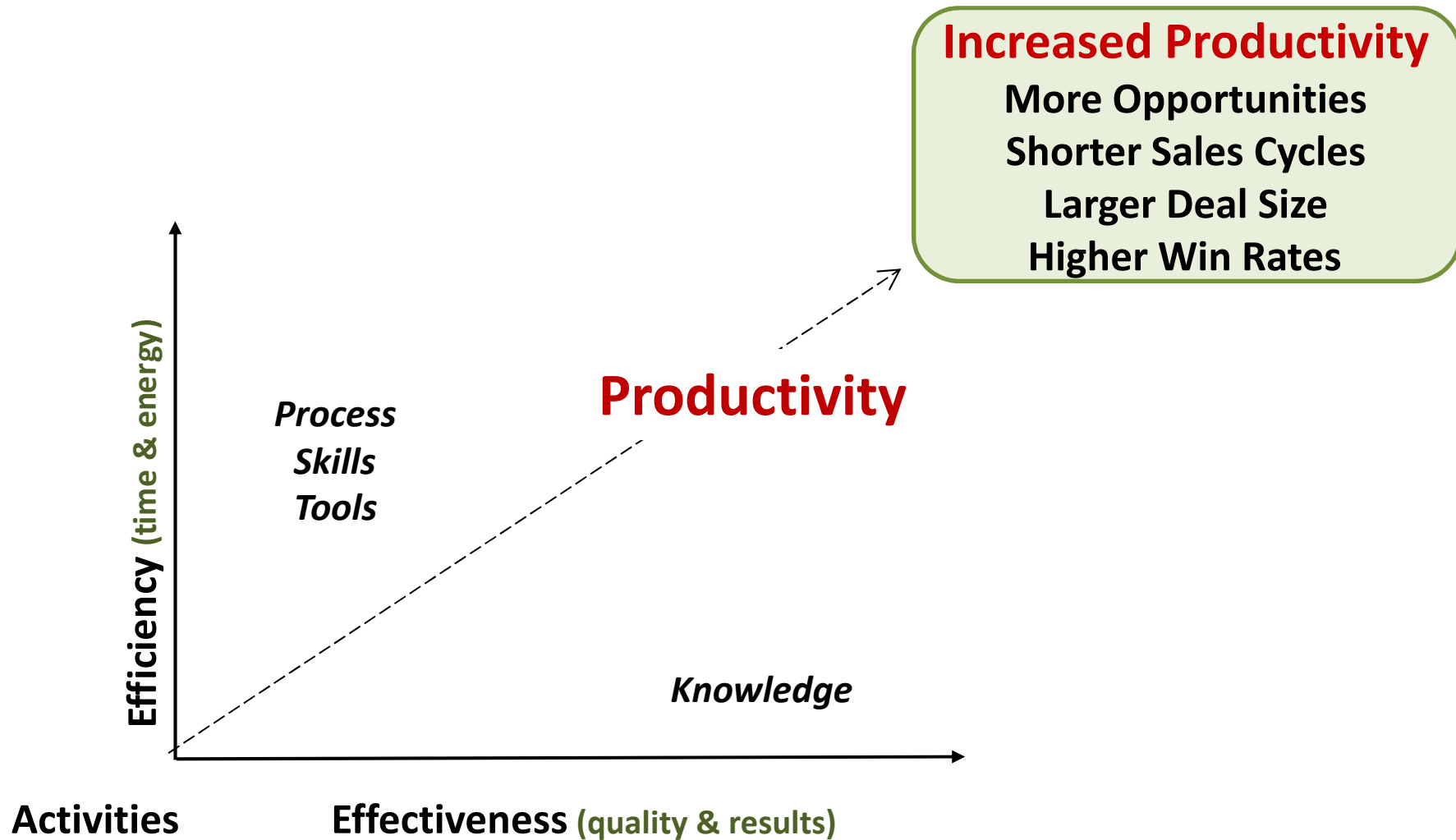
[www.territoryplan.com](http://www.territoryplan.com)



**Ron Snyder**  
President

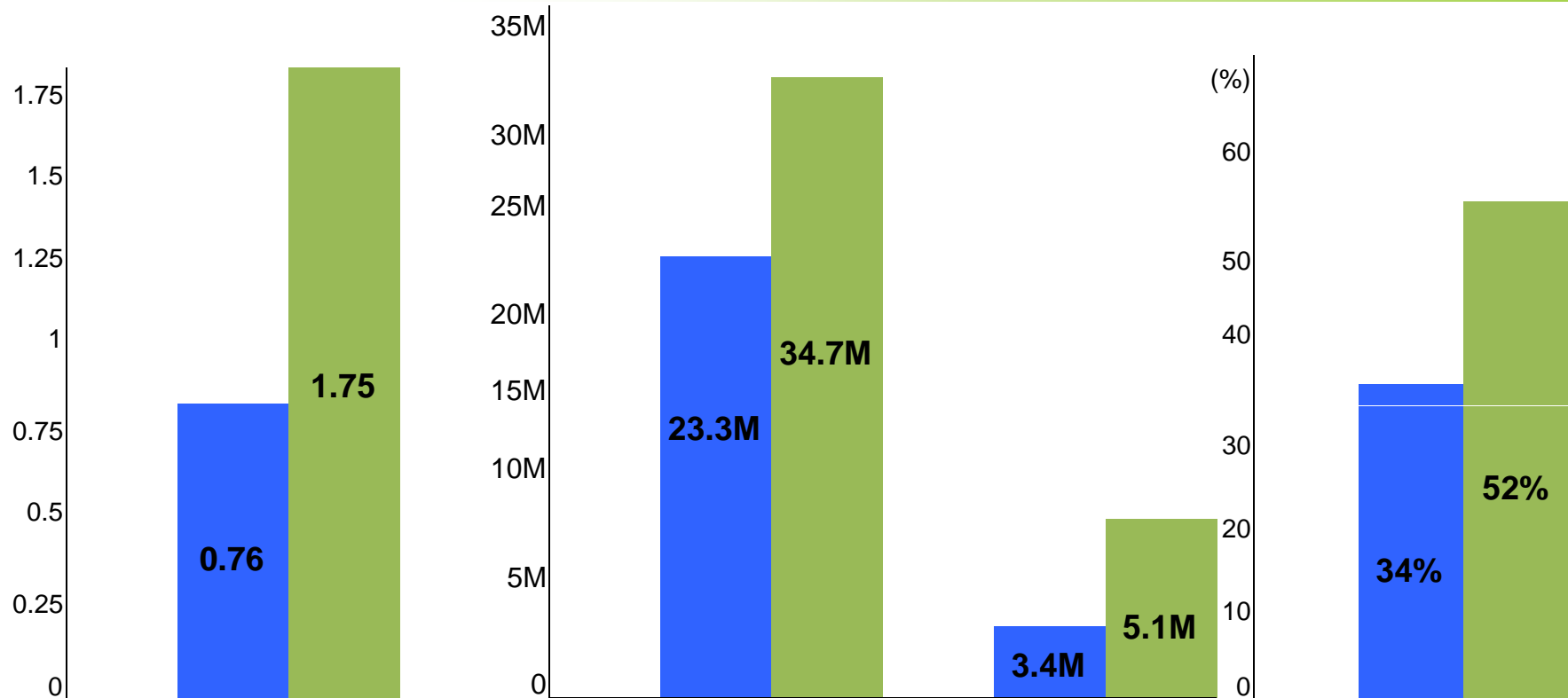
# Convert Raw Data into Meaningful ACTION!







# Sample Results: High Value, Capital Equipment Sales



**Win/Loss Ratio**  
131% Improvement



**Bookings**  
49% Improvement



**Sales/Salesperson**  
50% Improvement



**Market Share**  
53% Improvement

**And Margins increased 10%  
In high-value, capital equipment sales**

Before

After (1.5 years later)

# plan2win The Sales Capacity Challenge

## Salespeople struggle with Sales Knowledge Requirements

- Information (internal)
- Intelligence (external)
- Product
- Market
- Company



## FOCUS

- Goals
- Numbers needed
- Understand the Trends
- Develop your Strategy
  - ✓ Customers
  - ✓ Target Prospects
  - ✓ Opportunities
  - ✓ Partners
- High Payoff Activities
- Input from Management



**You've got to Plan to Win!**

## EXECUTE

- Act on Plan
- Available (in SFDC)
- Fine-tune



**You've got to Plan to Win!**

1. Sense of Urgency
2. Sponsorship
3. Vision & Strategy
4. Communicate
5. Ensure Action
6. Short-Term Wins
7. Broaden Adoption



plan2win

# Partial Customer List



Honeywell

You've got to Plan to Win!



## What People Say about our Apps

*“It’s the kind of tool you need to run your business.”*

*- Chief Sales Officer of a Technology company*

*“It makes Salesforce a usable tool for salespeople...*

*that I can build and manage my plan in.”*

*- Business Development Manager of a Medical Technology company*

*“Simple, easy territory planning tool. Excellent tool to get Territory Account Managers quickly focused to identify key opportunities and ensure they are building strong buying relationships with strategic clients. Installation friendly; deployed globally with no issues.”*

*- Business Application Manager of a major Telecomm company*

*“Great way to integrate written plans into Salesforce: Nice priced app that takes all of the written 'side notes' we kept on accounts and puts them into an organized fashion.*

*Fast and easy to setup.”*

*- President of a Technology company*

*“Your tools are an essential part of a successful sales team these days and truly the difference between good and great.”*

*- CEO of a Venture Capital firm*



# New Book: PLAN to WIN; Strategic Territory and Account Planning



PLAN to WIN book helps you create a solid plan and implement it to accelerate sales results.

**You've got to Plan to Win!**

plan2win



# Territory Plan Pro Account Plan Pro Pre Call Planning

salesforce.com<sup>®</sup>  
ISV Application Partner

[www.territoryplan.com](http://www.territoryplan.com)

**You've got to Plan to Win!**

650-508-0622