



Jim Heffernan

Insights53.com
Jim@insights53.com

Insights53

Sales Performance Management



A. B. DICK



KONICA MINOLTA



KEEP OUT!



Insights53

Sales Performance Management



MHI Global Copyright

License Agreement Regarding Copyright Works

Neither you nor your employer nor any other party may:

- a) Reproduce the Program Materials, in whole or in part, in any form or by any means;
- b) Prepare derivative works of the Program Materials, including but not limited to summaries, modifications and/or translations;
- c) Distribute copies of the Program Materials whether or not for sale, or to persons who have not completed the Miller Heiman program supported by the Program Materials;
- d) Perform or display the Program Materials publicly; or
- e) Authorize others to do any of the foregoing.

Plans are of little value,
the value is in the
process of planning

Basic premise

- Look at pivoting your approach
- Walk you through a proven framework
- Offer you a kit for DIY workshop

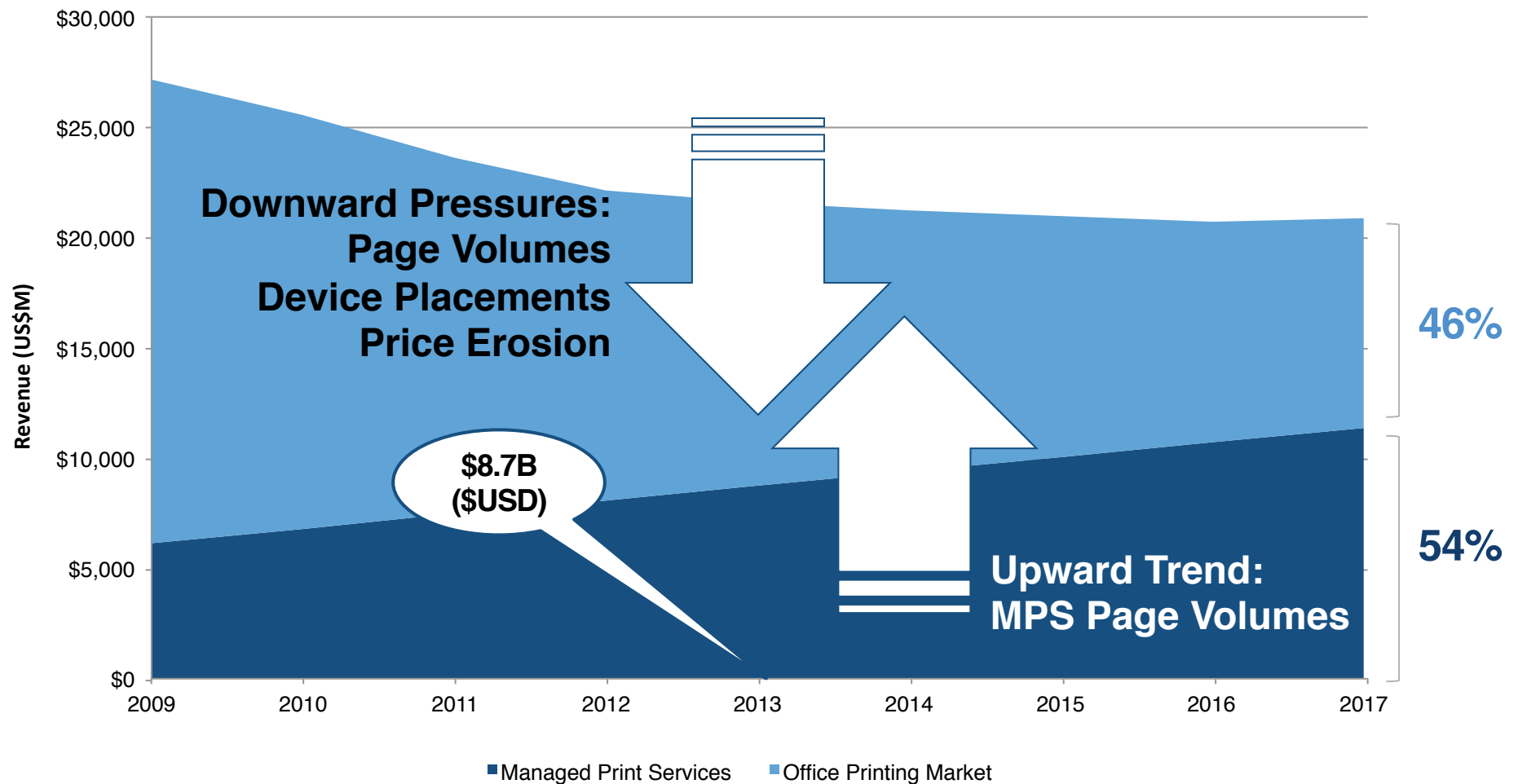
Agenda

- Get a little bit better at being a leader
- Help your people be better contributors
- Optimize business models with strategy
- Remove some risk by adding some process

Objectives

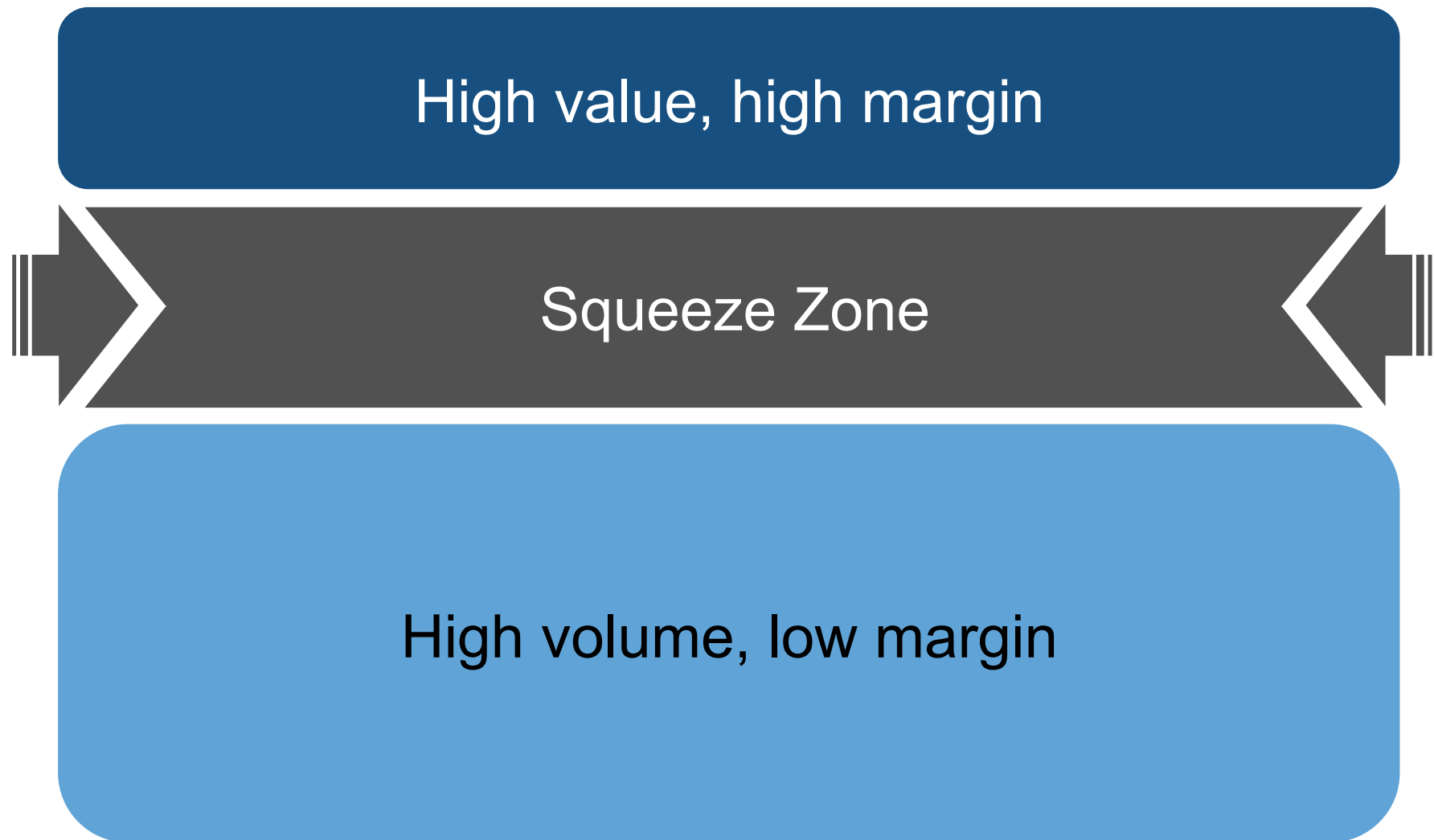
Trends affecting your business

Managed Print Services versus Office Printing Market North America, 2009 - 2017



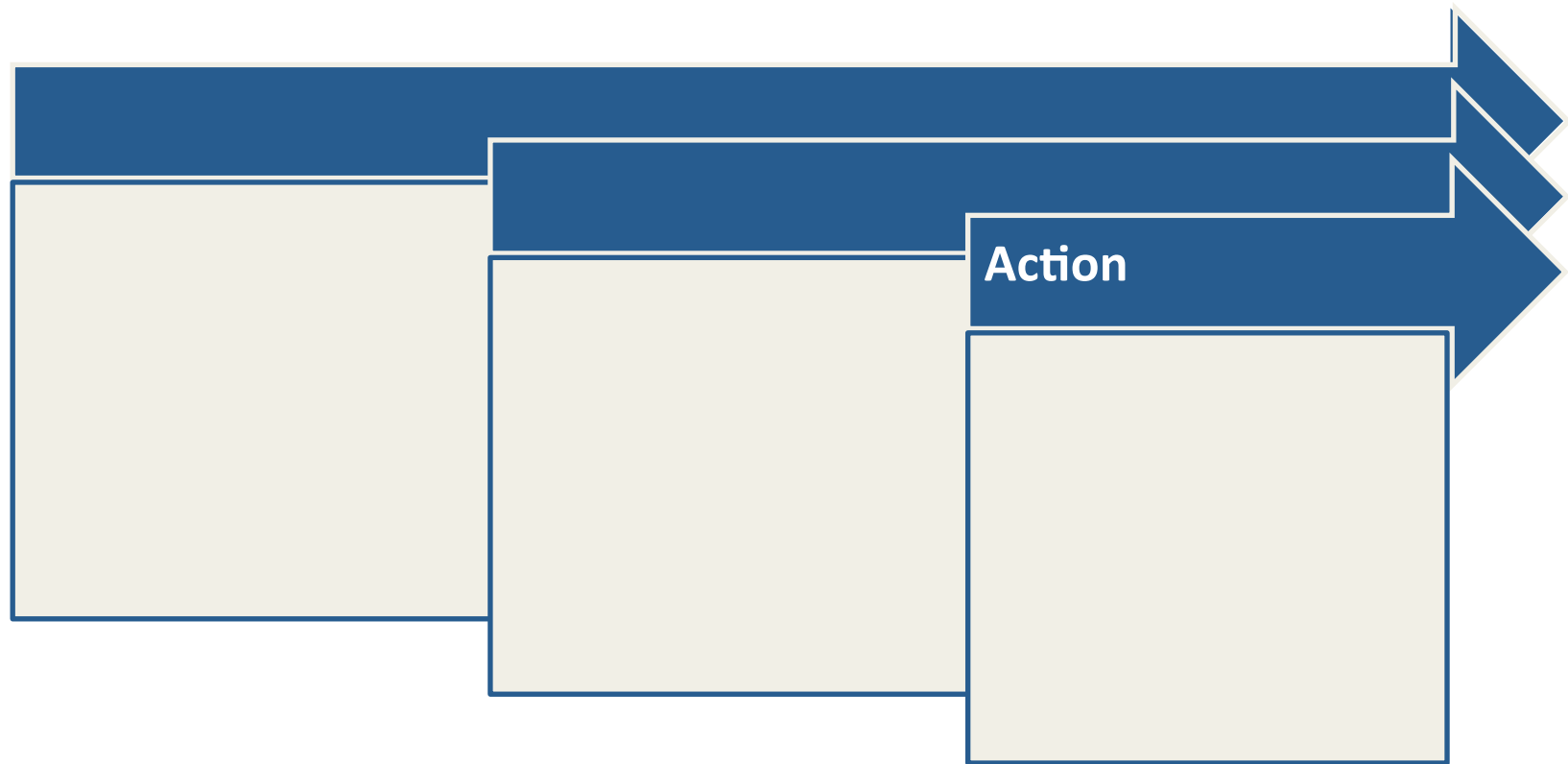
Source: Photizo Group, 2013 MPS Forecast, and
Hardware Advisory Service and Supplies Advisory Service Forecasts, 2012

Opportunities or threats

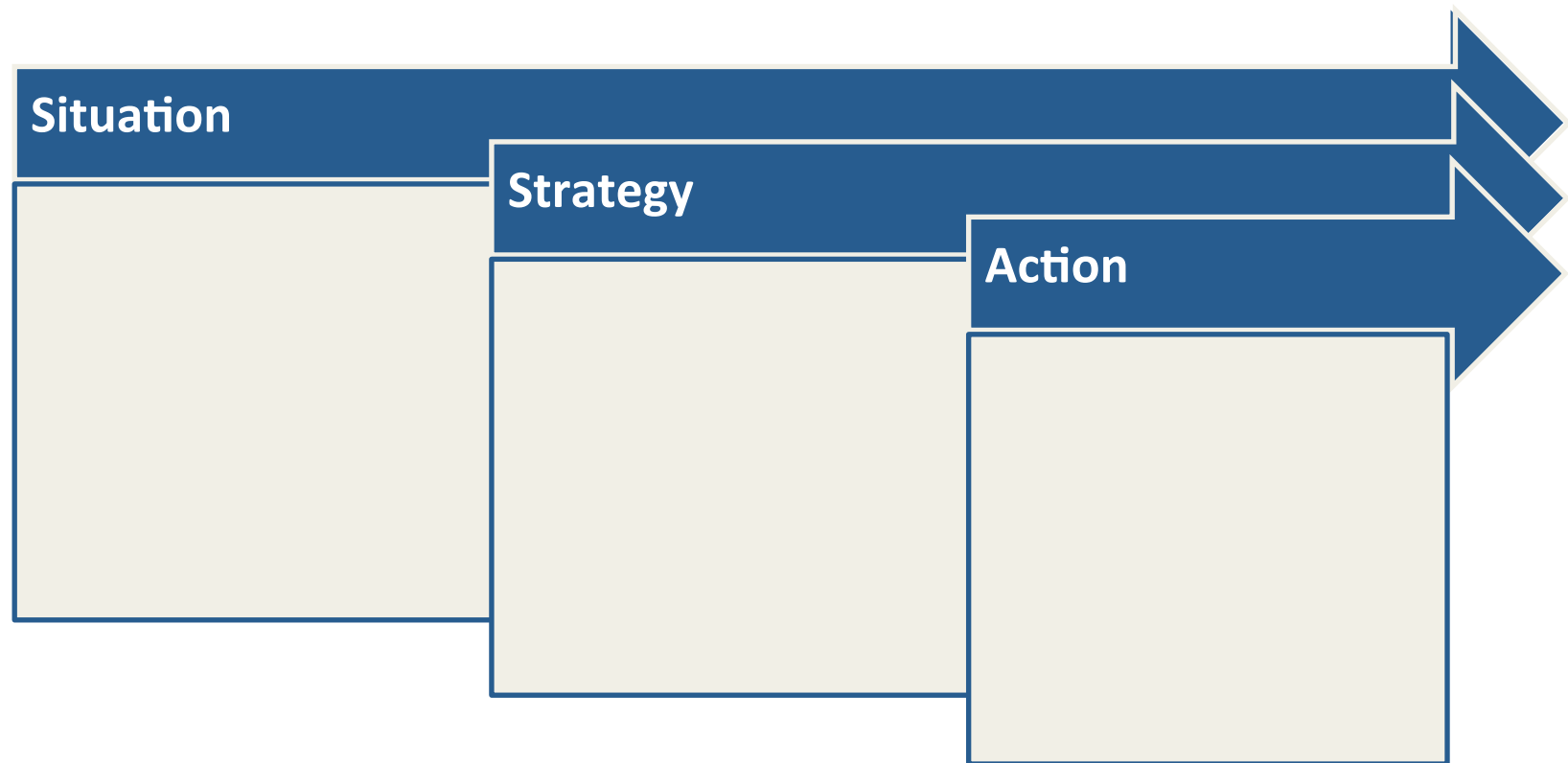


- Someone else's plan
- Your view
- An event
- Numbers focused
- Adoption
- Sustainability

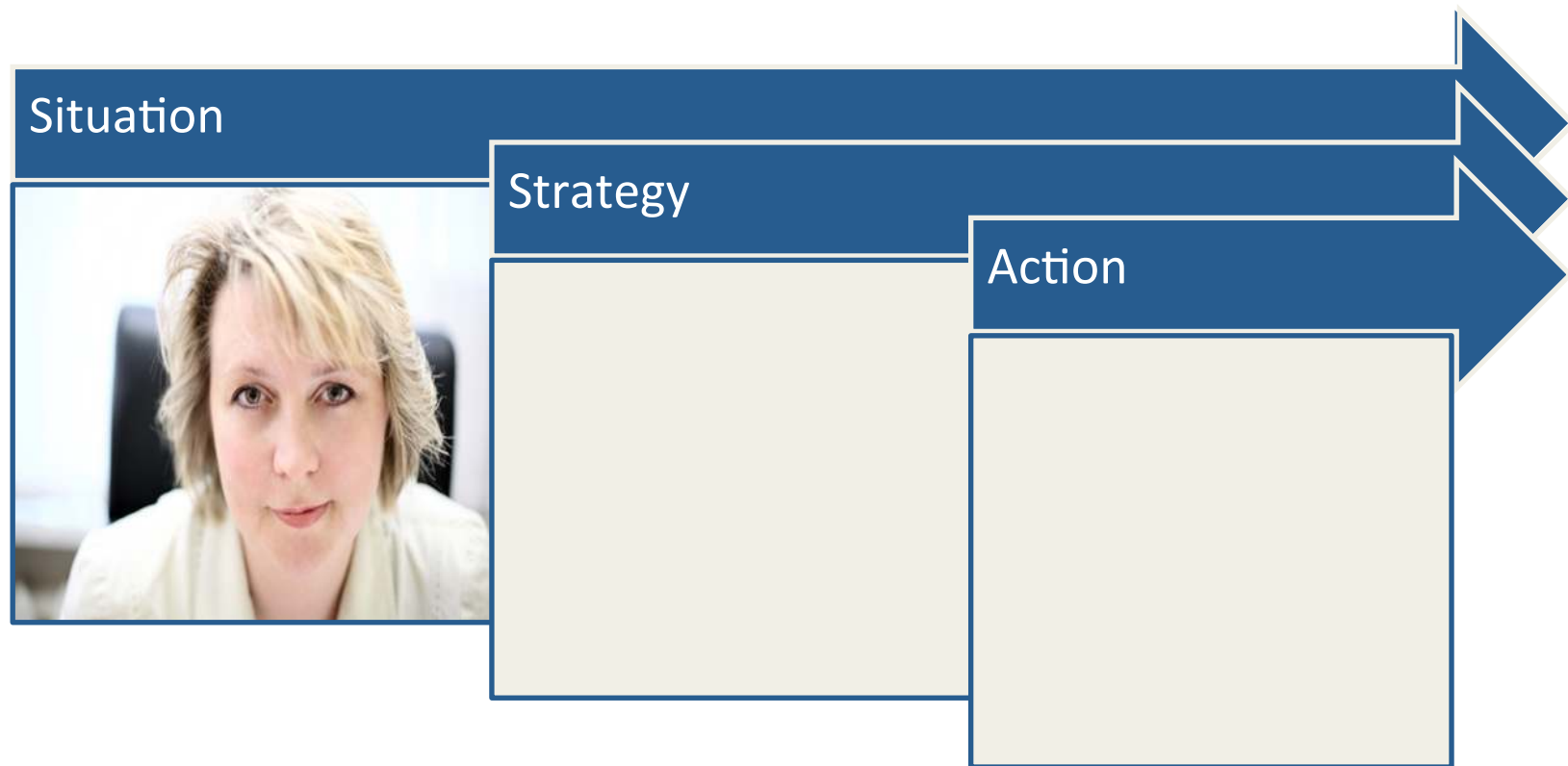
Common issues



Introduce process



Introduce process



Add customer perspective

Situation



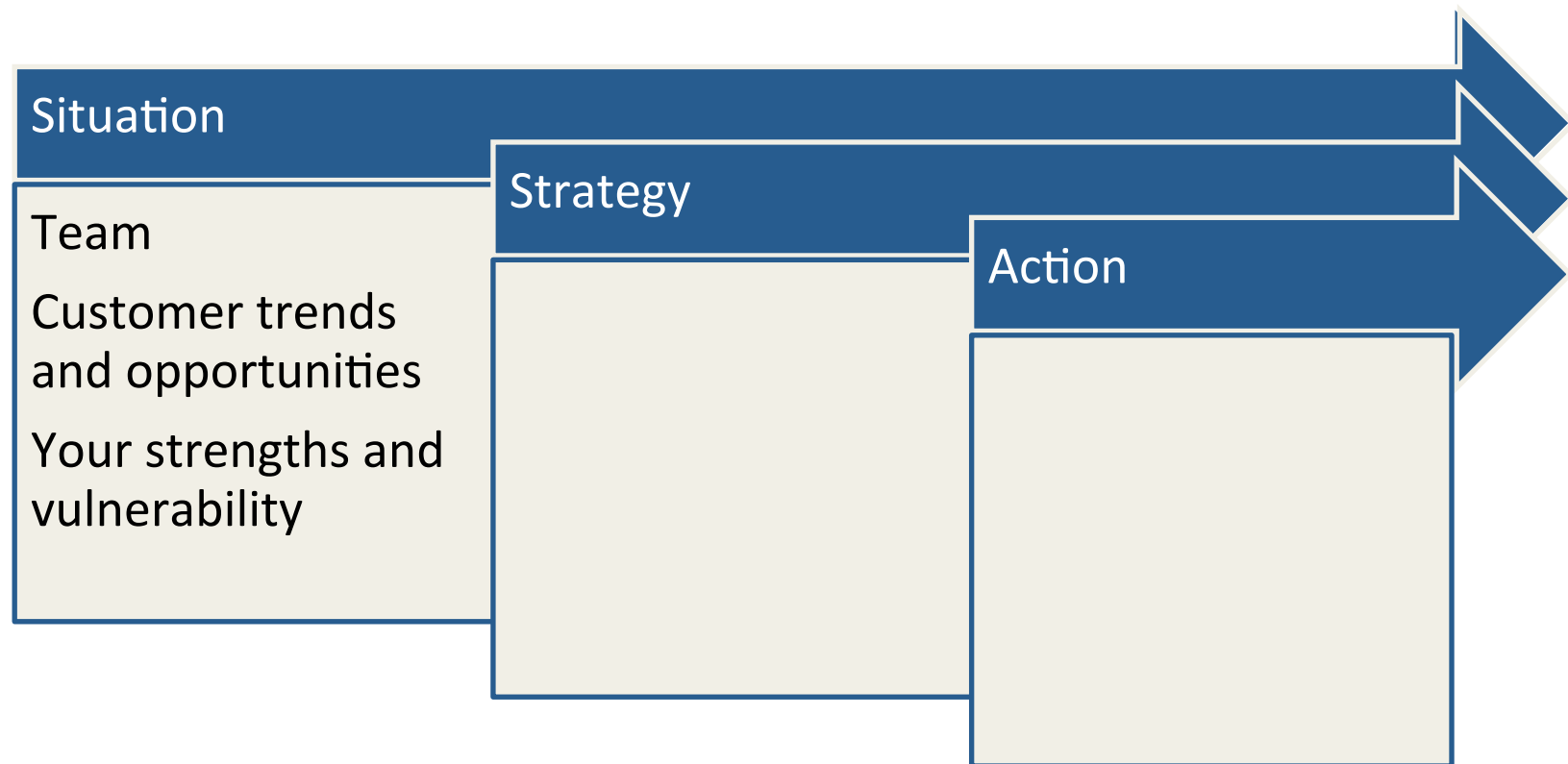
Strategy



Action



Add personal accountability



Work the process



- Service
- Operations
- Marketing
- Finance
- Sales

Engage your team

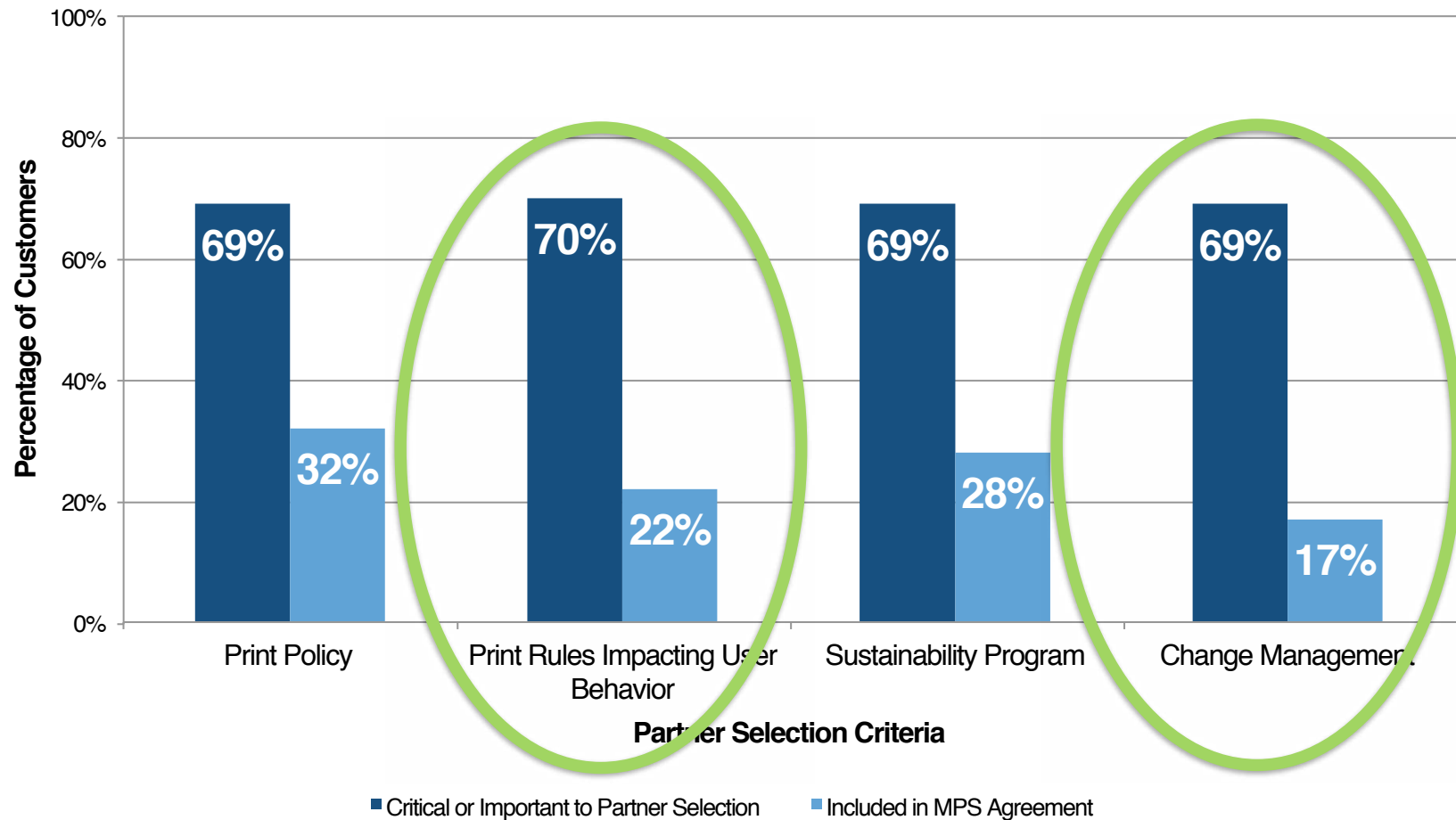


Unique from
competitors

Aligned to
customer
opportunities

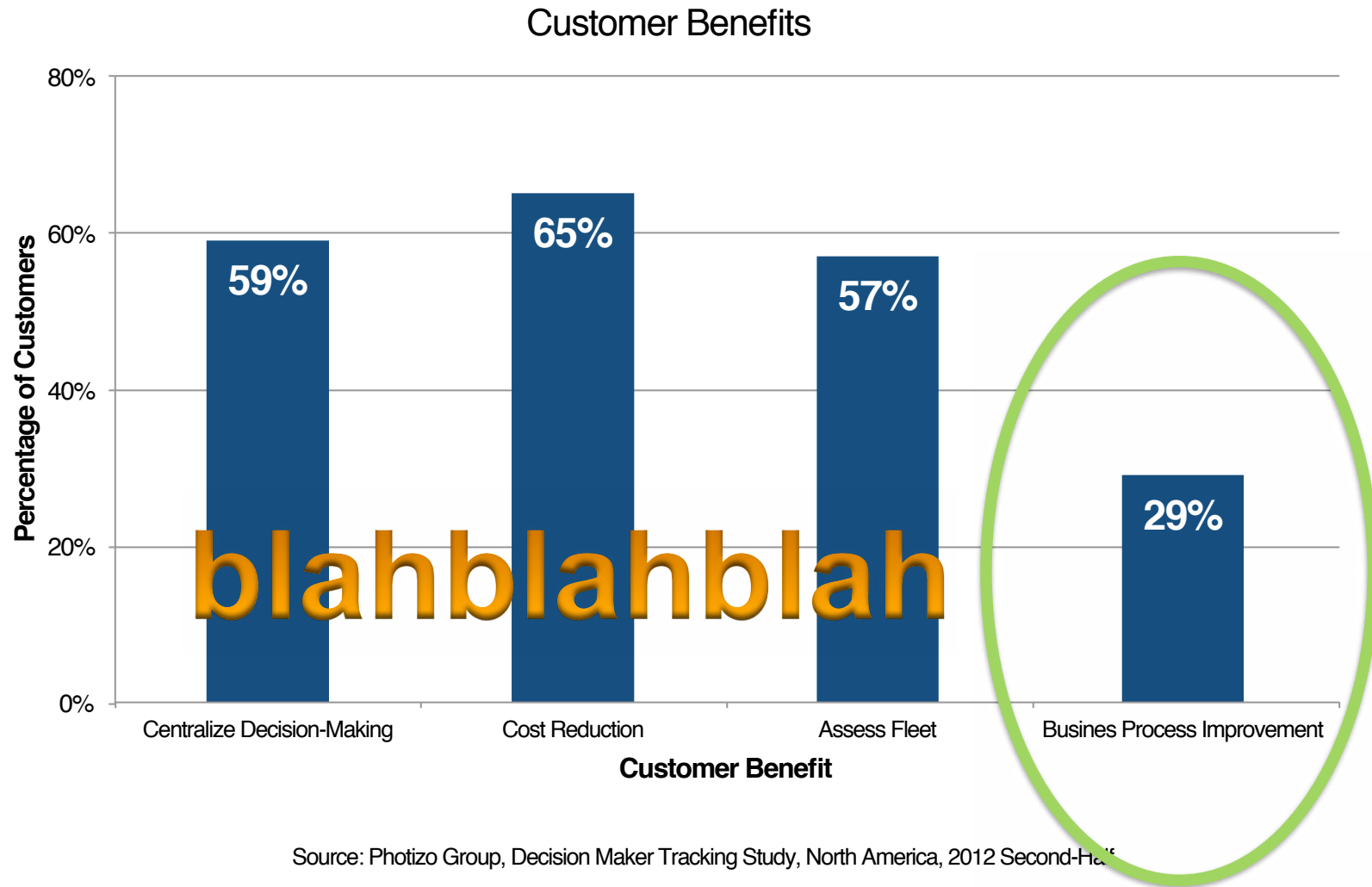
Identify your strengths

Gap: Selection vs. Agreement



Source: Photizo Group, Decision Maker Tracking Study, North America, 2012 Second-Half

Strength finder



Strength finder



1. Print rules
2. Business process improvement
3. Change management

Leverage strengths

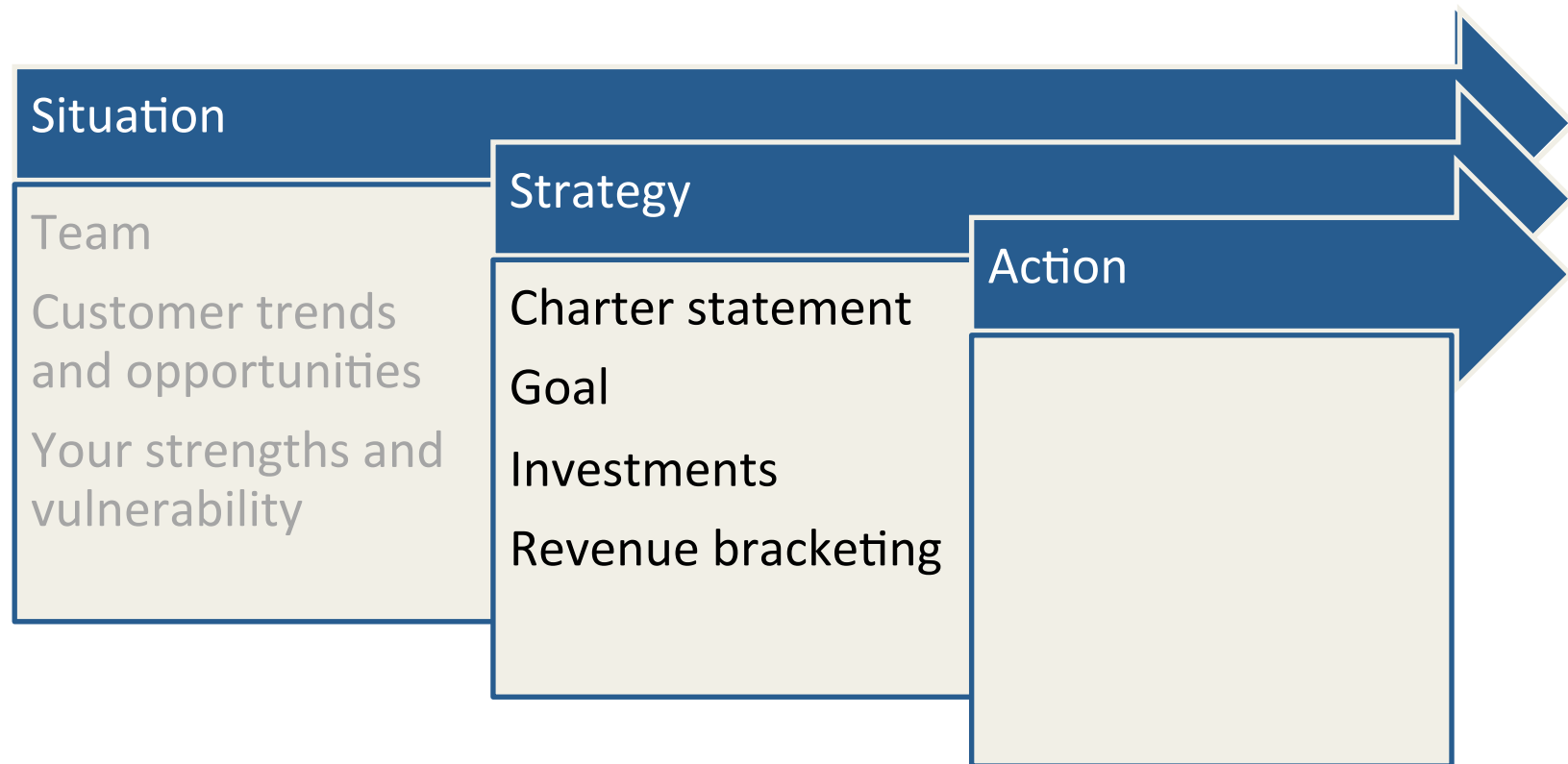


If left unchanged,
would damage
strategy

Identify vulnerability

Situation Analysis	
Customer	Field(s) of Play Healthcare
	Trends Obamacare, reduced reimbursement managed cost of care, mobility, BYOD
	Opportunities Virtual care, information access, cost control and reduced CapEx, supply chain efficiency
You	Strengths Business process improvement Change management Print behavior
	Vulnerability Production print

Situation completed



Work the process

formula

Key players **(A)**
in the target customer segment **(B)**
will accomplish ...(C)
by adopting ...from Dealership **(D)**

Charter statement

formula

Be **perceived** by the **Key Player**(s) as the **supplier** who helped them accomplish an **opportunity** by supplying **strengths**.

Goal

- Focus: invest in products, expertise and operational support for rules-based printing, business process improvement and change management
- Stop: rebalance investments

What	Amount	Customer Benefit	Your Benefit	Stop or Continue
Rep coverage	\$40,000	No	No	Stop
Loyalty Program	\$30,000	No	?	Stop

Investments

example

Do nothing

+ investments

- stop investments

Time	Low	High	Realistic
2014	\$300,000	\$1,000,000	\$500,000
2015	\$500,000	\$1,200,000	\$650,000
2016	\$650,000	\$1,400,000	\$800,000

Revenue Bracketing

Charter Statement: Non-technical buyers in healthcare accounts will enable information access and reduce CapEx by leveraging document management services from AB Business Systems.

Goal: Be perceived by non-technical buyers in healthcare as the supplier who helped them accelerate EMR adoption by supplying easy access to record scanning without using CapEx.

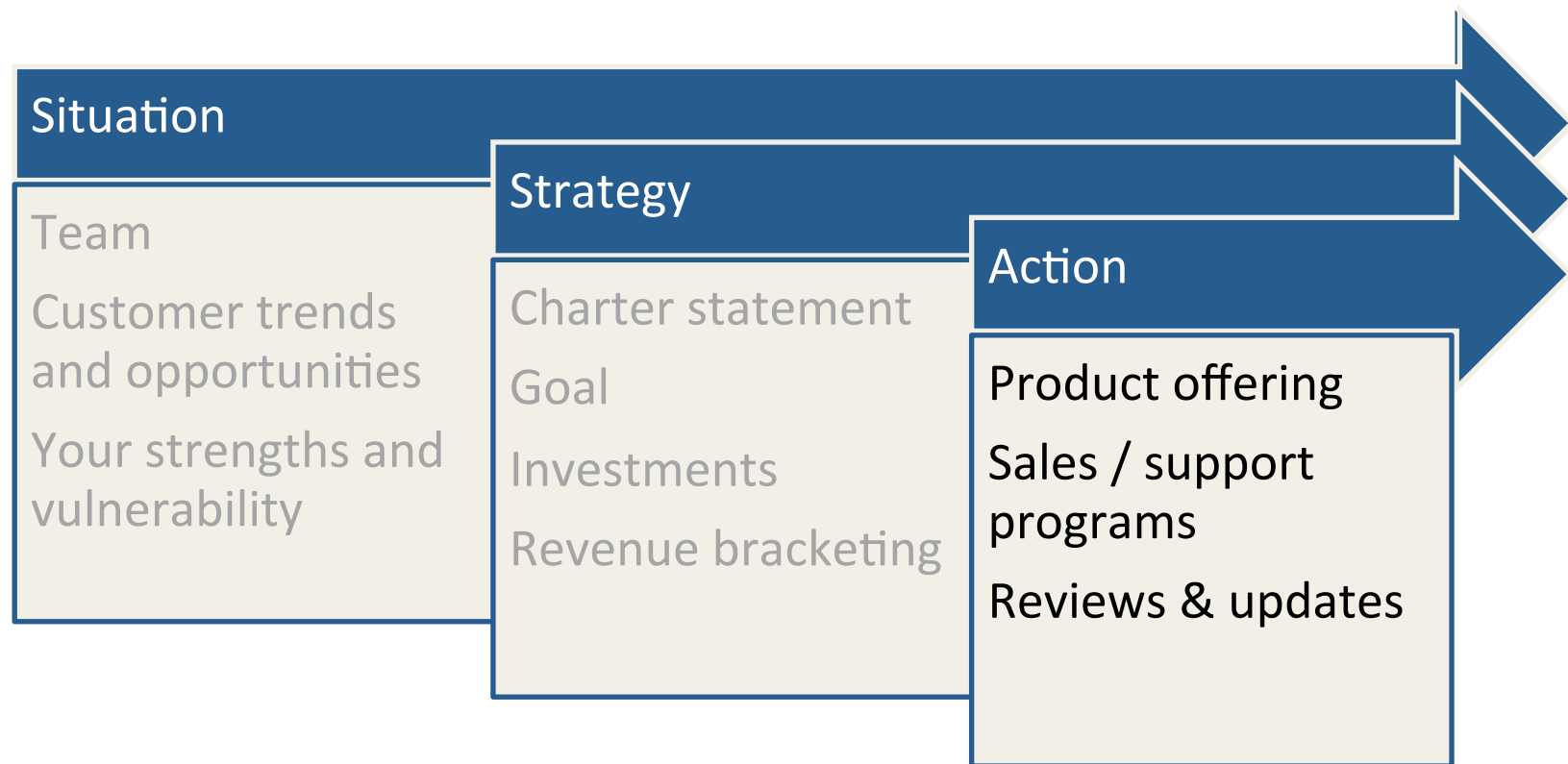
Investment: Invest in products, expertise and operational support for rules-based printing, business process improvement and change management

What	Amount	Customer Benefit	Your Benefit	Stop or Continue
Rep coverage	\$40,000	No	No	Stop
Loyalty Program	\$30,000	No	?	Stop

Revenues: Realistic projections are \$500,000 in 2014, \$650,000 in 2015 and \$800,000 in 2016.

Time	Low	High	Realistic
2014	\$300,000	\$1,000,000	\$500,000
2015	\$500,000	\$1,200,000	\$650,000
2016	\$650,000	\$1,400,000	\$800,000

Strategy completed



Work the process



MPS +

Print rules for user behavior

Business process
improvement

Change management

Product offer

What	New Investment	Who	When
Lunch and Learns	\$5,000	Crosby	Monthly Jun - Nov
Customer event	\$10,000	King	Oct
Blog / Social	\$0	Montgomery	Weekly starting Jan

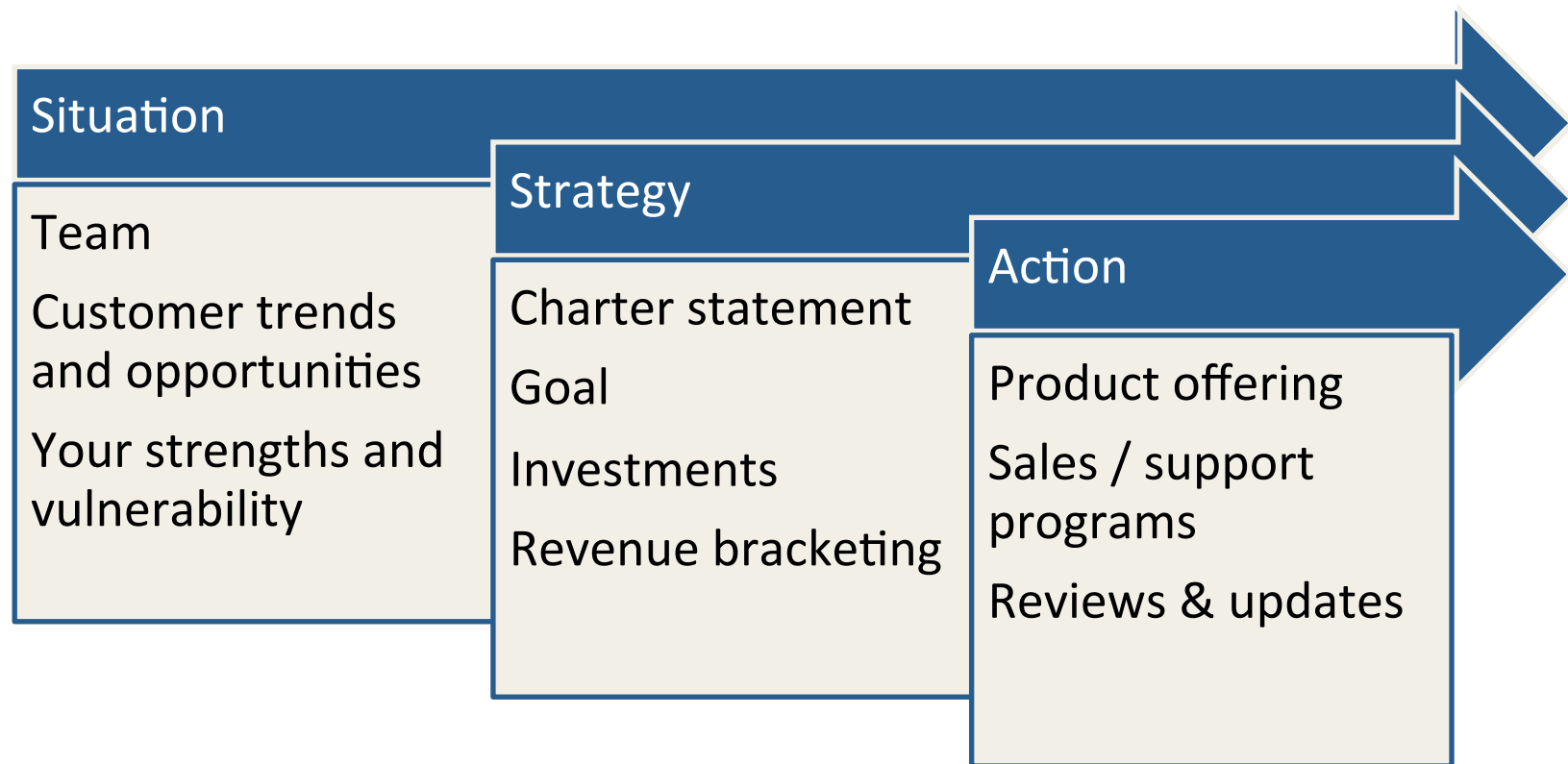
Q: Link to investments and goals?

Sales / Support Programs

Product Offer	Description
MPS with Workflow	MPS+ includes print rules, business process improvement and change management

Sales Support Programs	Investment	Owner	Time
Lunch and Learns	\$5,000	Crosby	Monthly Jun - Nov
Customer event	\$10,000	King	Oct
Blog / Social	\$0	Montgomery	Weekly starting Jan

Action completed



Process complete

Situation Analysis	
Customer	Field(s) of Play Healthcare
	Buy-Sell Hierarchy Deliver “good” product or service
	Trends Obamacare, reduced reimbursement managed cost of care, mobility, BYOD
You	Opportunities Virtual care, information access, cost control and reduced CapEx, supply chain efficiency
	Strengths Business process improvement Change management Print behavior
	Vulnerability Production print

Situation

Charter Statement: Non-technical buyers in healthcare accounts will enable information access and reduce CapEx by leveraging document management services from AB Business Systems.

Goal: Be perceived by non-technical buyers in healthcare as the supplier who helped them accelerate EMR adoption by supplying easy access to record scanning without using CapEx.

Investment: Invest in products, expertise and operational support for rules-based printing, business process improvement and change management

What	Amount	Customer Benefit	Your Benefit	Stop or Continue
Rep coverage	\$40,000	No	No	Stop
Loyalty Program	\$30,000	No	?	Stop

Revenues: Realistic projections are \$500,000 in 2014, \$650,000 in 2015 and \$800,000 in 2016.

Time	Low	High	Realistic
2014	\$300,000	\$1,000,000	\$500,000
2015	\$500,000	\$1,200,000	\$650,000
2016	\$650,000	\$1,400,000	\$800,000

Strategy

Product Offer	Description
MPS with Workflow	MPS+ includes print rules, business process improvement and change management

Sales Support Programs	Investment	Owner	Time
Lunch and Learns	\$5,000	Crosby	Monthly Jun - Nov
Customer event	\$10,000	Montgomery / Crosby	Oct
Blog / Social	\$0	Montgomery	Weekly starting Jan

Action

Traditional		Innovative
An event		On going
Driven by management		Developed by team
Blinded by dollars		Focused on strategy
Selling organization view		Adds customer issues and opportunities
Stay competitive		Leverage strengths
Lack consistency, visibility, manageability		Consistent, repeatable, easy visibility, manageable
Adoption and sustainability challenges		Starts with engagement, understanding, commitment



So what has changed?



Select the team

Schedule ½ day
workshop

Use the Kit

Back at your office

Strategic Business Plan

Best Practices For Maximizing New Business Development

The plan itself is worthless. It's the planning process that has value!

This kit gives you everything you need to lead an effective strategic planning process with your team in half a day. It starts with fresh perspective and collaboration. It ends with personal accountability for execution.

What The Kit Includes:

- Tips for picking the team
- Suggested pre-work
- 4-hour workshop agenda
- Templates for team action plans
- SMARTs goals for personal accountability
- A Power Point of the main concepts
- Coaching from Jim Heffernan

Use the Strategic Planning Process Kit to get your team engaged from the start and to establish accountability for individual results.



<http://offers.insights53.com/strategic-business-kit>

DIY Kit

Strategy	Key Deliverables (What You are Going to Get From Organization)	Tactics	Timing	Owner
Metrics:				



Team accountability

SMART goals

Feature	Detail	Goal #1
Specific	Specific target	Develop and execute healthcare vertical attack program
Measurable	Metrics to measure results	Incremental deals in funnel, win rate, new accounts, and revenue, anecdotes
Attainable & challenging	Evidence it is attainable and challenging	Success in legal FY'13; content available but needs structure
Relevant	Details on how it is relevant for the employee's role and authority	My role is sales enablement, credibility with sales managers, access to funding and marketing resources
Time-bound	Timer period covered	Develop Jun-Jul Launch Aug Reviews start Dec
Summary	Wrap it into one statement	Contribute to revenue growth by launching a sales program to penetrate the healthcare segment

Personal accountability

- Leading indicators

Team plan reviews

Timely actions by team

SMART goals added to
performance reviews

Team effectiveness

- Lagging indicators

Return in focus
investment

Revenue targets –
trends vs. no plan

Success Metrics

- ✓ Get a little bit better at being a leader
- ✓ Help your people be better contributors
- ✓ Remove some risk by adding some process
- ✓ Optimize business models by defining strategy

Today's objectives

Thank you

Insights

