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# Sales Strategy Framework

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## Introduction

All companies need a sales strategy — without one, there’s a lack of focus, growth can stall, and revenue targets won’t be hit. A successful sales strategy needs to enable sales to hit their numbers, incorporate cross-team support, and consider a company’s buyers and prospects, its sales tech stack, management of current accounts, compensation and quota plans, and the development of a well-oiled enablement system.

This sales strategy framework provides descriptions and benefits for the various components of a sales strategy, suggested deliverables, and thought starters that will provide your sales teams with a better sense of the knowledge gaps in their current approach and strategy.

# Sales Strategy Framework



An organization’s sales strategy builds upon the insights from the external marketplace and remains aligned with the corporate strategy, while also addressing how sales will achieve the revenue objective with support from the product, pricing, marketing, customer success, and customer experience teams. The strength of a sales strategy requires making choices on which programs to invest in and which to forgo.



## What is a sales strategy?

A sales strategy is an operating plan for a company’s sales force.



## What does a sales strategy do?

A sales strategy allocates sales resources efficiently to drive selling costs down and revenues up.



## What does it mean to use a sales strategy?

The use of a sales strategy increases the likelihood of the sales executive to reach their revenue objectives.

# Sales Planning



## Revenue Plan

### Brief Description

Define the plan for how you are going to achieve your revenue goal.

### Benefit

Organizations will have a better chance at achieving their revenue target by having a granular understanding of where the revenue will come from, and if the goal is realistic. Many revenue plans are built from a top-down assessment of last year's number. Sales leaders need to have a clear vision into where that number will come from, what is standing in its way, and what new opportunities are available.

### Deliverables

- Bottom-up revenue analysis
- Cost of sale analysis by role
- Revenue plan by channel
- Revenue plan risk analysis
- Revenue plan leading indicator dashboards

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. You have a financial model that summarizes how you are going to make the number.
2. You have a financial model that summarizes the costs associated with making the number.
3. You know how your revenue breaks down across market segment, customer segment, and sales channels.
4. You know the KPIs you need to measure to ensure you are on track.
5. You have an execution plan that details what you will do in pursuit of the revenue goals.
6. You know what resources are needed to make your number and when they need to be hired and productive.
7. You use a consistent and scalable budget methodology that is best suited for your business (e.g., percentage of revenue, competitive benchmarking, objectives based, affordability, etc.).
8. You know how you will track spending to ensure you are on track to make your number.
9. Your desired return on sales investment has been defined and communicated to the leadership team.
10. Your sales budget has been developed so you can meet your revenue goals.

**On a scale from 1-5, how important is a revenue plan to your business?**



## Accounts

### Brief Description

Properly align your sales resources to your highest value accounts.

### Benefit

Aligning the top talent in your sales organization to your top accounts is the fastest way to produce growth. Having a deep understanding of your customer's ability to spend, and over what time frame, gives you a competitive advantage when making allocation decisions against market opportunities.

### Deliverables

- Ideal customer profile (ICP)
- Propensity-to-buy (PtB) formula
- Prioritized account list
- Customer and prospect account potential
- Define sales motion by account, i.e., the retain, acquire, develop (RAD) model

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. Your ICP is maintained on a regular basis using data analytics.
2. You have scored each prospect/customer relative to your ICP.
3. The potential spend for each prospect/customer is quantified and known by the sales team.
4. Your customer acquisition cost (CAC) is known by account.
5. The customer lifetime value (CLTV) is known by account.
6. You have defined the PtB for each prospect/customer (i.e., the likelihood of each prospect/customer to buy from us).
7. You use a RAD model to define the sales and marketing motion for each account.
8. You have matched sales channel to account using CAC and CLTV.
9. You assign your best sales talent to the accounts with the most potential.

**On a scale from 1-5, how important are accounts to your business?**



## Buyers

### Brief Description

Buyer analysis begins with understanding how your buyers make purchasing decisions.

### Benefit

Being able to align your sales motions to buyer preferences will enable your organization to win more often with higher price points. Your approach must appeal to both the logical and emotional needs of each individual buyer in your accounts.

### Deliverables

- Buyer personas
- Buyer touchpoint analysis
- Buyer process maps
- Critical success factors

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. Through direct customer research, you have defined your buyer personas.
2. You know the evaluation criteria your buyers use when making a purchasing decision.
3. You allocate sales resources based on the value your customers say they bring to each touchpoint.
4. When your buyers do not purchase your products, you research and understand what their stated reasons are.
5. You know the decision-making process (journey) your buyers follow for each market segment, product, and sales channel.
6. The decision to buy your product or service is made by a consolidated, central buying decision team (BDT).
7. You understand if and how your customer's buying process varies in length per market segment, customer profile, buyer persona, product, and/or sales channel.
8. You know which channels your customers prefer to buy your products through and why they prefer to buy that way.
9. Your value propositions have been validated by customers.
10. You conduct win/loss calls to understand which competitors you win or lose to and why.

**On a scale from 1-5, how important are buyers to your business?**

# Execution



## **Prospecting**

### **Brief Description**

Fill the sales funnel with enough opportunities to make the revenue goal.

### **Benefit**

Getting access to high-value buyers is the most critical activity a salesperson can do. Having a repeatable process to gain access makes you less reliant on marketing and removes risk from your revenue plan. The ability to gain access at scale will have a drastic impact on your new business production.

### **Deliverables**

- Relationship management process
- Referral generation program
- Social selling execution plan
- Prospecting activity standards
- Event execution plans
- Instructor training guides

### **Thought Starters**

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. You know what your buyers want from you early in their decision process.
2. You know the programs you need to implement to generate leads (social selling, referrals, offline prospecting, etc.).
3. You know which resources the sales team needs when executing prospecting processes.
4. You know how you are going to get the sales team to adopt their prospecting programs.
5. You have made the prospecting process easy to execute with the use of technology.
6. You actively track metrics that indicate the success and/or failure of your prospecting process.
7. You have training programs in place that continuously provide new prospecting methods for the team.
8. Event success or failure is assessed by how many qualified leads are generated.
9. Incentive-based referral programs successfully create revenue-generating leads for the sales team.
10. Your sales team has been enabled with a relationship management process that allows them to reach new buying centers within existing accounts.

**On a scale from 1-5, how important is prospecting to your business?**



## Opportunity Management

### Brief Description

Implement a streamlined process to consistently secure an increased number of new logo deals with greater financial value more often.

### Benefit

A consistent opportunity management process turns repetition into revenue and allows for more effective coaching through the sharing of best practices. Sellers who consistently follow a process achieve results that are 20% to 25% higher than their peers.

### Deliverables

- Sales methodology
- Deal desk process
- Sales playbooks
- Sales job aids
- Pipeline and forecast process
- Instructor training guides
- Coaching playbook and tools

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. You have rolled out a standardized new logo opportunity management process to anyone who hunts.
2. Your opportunity management process is consistently followed by all hunters.
3. Your standardized opportunity management process is research based and aligns with how your buyers make purchase decisions.
4. Your sales cycle length is shorter than your competitors.
5. Your win rate is higher than your competitors.
6. Your average deal size is higher than your competitors.
7. Your sales team has access to all the necessary resources to execute the opportunity management process.
8. All of your opportunity management processes are embedded into your customer relationship management (CRM) system and actively used by sales.
9. Behavioral, leading, and lagging KPIs are used to indicate success and/or failure of your opportunity management process.
10. A robust pipeline and forecasted process is used to advance opportunities through the opportunity management process.

**On a scale from 1-5, how important is opportunity management to your business?**



## Account Management

### Brief Description

Generate new opportunities within your current accounts.

### Benefit

Creating new opportunities within your accounts is the fast way to increase revenue. Where relationships exist, sales reps must be able to expand into new buying centers to capture more wallet share. This requires a strategic and tactical plan across each account.

### Deliverables

- Account plans
- Account management methodology
- Sales playbooks
- Sales job aids
- Pipeline and forecast process
- Instructor training guides
- Coaching playbook and tools

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. A large percentage of each account manager's success or goal is based on upselling and cross-selling within current customers.
2. You have a formal account management process that is used to cross-sell within your current customer base.
3. You have a small number of accounts that are worth a lot, and improving the wallet share within those accounts will be the difference between making and missing your number.
4. A-player account managers consistently outperform C-player account managers.
5. Your approach to growing current customers is systematic, which enables all account managers to speak the same language when approaching the market.
6. New account managers learn a rigorous process to help them quickly ramp into the account management role.
7. Account managers have a formal account planning process to map out opportunities within accounts.
8. Account managers have opportunities to sell to new buying centers within accounts that are currently not penetrated.
9. You have a formal training and coaching process that continuously improves the performance of the account management team.
10. Your share of wallet with all your top accounts grows disproportionately faster quarter-to-quarter than other accounts.

**On a scale from 1-5, how important is account management to your business?**



## Coverage Plan

### Brief Description

Cover the market potential with the most cost-effective direct and indirect sales channels.

### Benefit

Design a coverage plan that serves the needs of your customers while optimizing CAC. Use the best channel to penetrate each account and maximize lifetime value.

### Deliverables

- Buyer channel preference assessment
- Customer acquisition cost (CAC)
- Customer lifetime value (CLTV)
- Bottom-up potential analysis
- Capacity model by role
- Coverage plan by channel
  - Key accounts
  - Field sales reps
  - Inside sales reps
  - E-commerce
  - External partners

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. For each go-to-market channel, you understand the CAC and CLTV.
2. You determine your coverage plan based on potential, as opposed to revenue alone.
3. Every account that can spend money with you gets the appropriate attention it needs to justify the spend.
4. You are over-staffing sales resources for your top accounts.
5. You are under-staffing sales resources for your bottom accounts.
6. You clearly understand how each segment of your total available market wants to be served.
7. Each customer and prospect in your total available market has an account potential assigned to it.
8. It is clear where each channel begins and ends, and you have minimal channel conflict.
9. You do not have expensive field sales reps calling on low potential accounts in the market.
10. When compared to your top three competitors, you understand how your coverage model is different and why.

**On a scale from 1-5, how important is a coverage plan to your business?**



## Partner Strategy

### Brief Description

Select the right partners, gain their mindshare, and drive more revenue through your key partnerships.

### Benefit

A partner strategy ensures you have the right partners working for your company. This enables you to cover more of the market in a cost-effective way. Recruiting and enablement of the right partners requires improved mindshare.

### Deliverables

- Ideal partner profile (IPP)
- Partner segmentation
- Partner value prop and recruitment
- Partner coverage plan
- Partner management org model and talent
- Partner marketing interlock
- Partner enablement

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. A partner strategy is routinely used to manage your partner program.
2. You have a dedicated partner management organization and budget that is sufficient enough to run a best-in-class partner program.
3. You have defined your IPP.
4. Your IPP was built using a research-based process.
5. You have scored each partner relative to your IPP.
6. You have segmented your partners and selected the ideal partner based on revenue potential and alignment with your territory strategy.
7. There is an enablement program in place that provides your partners with the tools to maximize revenue for your company's products/solutions.
8. The recruiting and onboarding process results in a short ramp-to-productivity timeline for your partners.
9. The revenue contribution from your partners has increased year over year.
10. Your partner program has led to lower CAC.

**On a scale from 1-5, how important is a partner strategy to your business?**



## Organizational Design and Talent

### Brief Description

Determine the right roles, number of headcount, and organizational chart required to make your number.

### Benefit

Quantitatively determine the right amount of headcount to hit your revenue target for the year. Within that headcount, design your roles to meet your revenue and cost targets. Ensure role clarity exists to maximize production.

### Deliverables

- Organizational chart
- Roles and responsibilities (i.e., RACI charts)
- Headcount model
- Job profiles
- Pro forma cost model
- Change management plan

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. You have selected one of the seven B2B sales organizational models that best supports your buyers (e.g., stratification, hunter/farmer, product specialist, industry specialist, role specialist, geographic, and hybrid).
2. The type of roles and responsibilities you need on your organizational chart have been clearly defined.
3. The ideal headcount needed by role has been clearly defined.
4. You have correctly deployed your sales capacity against the market opportunity.
5. Each role actively and consistently spends time on the right selling activities.
6. Sales leadership routinely conducts time studies to understand how reps allocate their time toward selling and other activities.
7. Whenever organizational changes are needed, there is a change management plan that is followed which minimizes disruption in the field.
8. You use job profiles that reflect industry best practices when hiring for sales positions.
9. You actively track costs associated with each role to accurately calculate CAC.
10. You know the actual (and forecasted) production generated by each role in the sales organization.

**On a scale from 1-5, how important is organizational design and talent to your business?**



## Territory Design

### Brief Description

Balance customer requirements, company revenue expectations, and sales rep workload to grow revenues.

### Benefit

Everybody on the team can hit quota. Align A-player talent to your best territories and provide a data-driven approach to proactively attack accounts in your markets.

### Deliverables

- Territory design methodology
- Workload capacity model
- Territory potential and goals
- Account assignment by territory
- Bottom-up/top-down modeling
- Transition and communication planning

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. You have proper coverage, which involves your sales reps spending the right amount of time on profitable customers and prospects.
2. You believe you can find hidden sales opportunities by realigning territories.
3. You have defined objective criteria to use when designing territories.
4. You understand the workload requirements for each account and territory.
5. You understand the ideal territory workload for each sales rep.
6. You calculate and use account potential as a key input to your territory design methodology.
7. You have a process to handle account and territory assignment changes without upsetting your customer.
8. Your territories are dynamically realigned using reliable data with an intuitive process.
9. Your territories are designed with balance and are properly aligned with quotas.
10. Your best sales reps are assigned the territories with the most potential.

**On a scale from 1-5, how important is territory design to your business?**



## Compensation Design and Quota Setting

### Brief Description

Sales compensation plans enable companies to achieve their revenue targets while effectively maximizing incentive compensation for high-performing reps without breaking the bank.

### Benefit

Best-in-class compensation plans align sales performance to corporate strategic objectives. They also help attract and retain A-players and drive the desired selling behavior and performance, positioning the company for greater success.

### Deliverables

- Compensation deliverables and tools:
  - Current plan assessment (including market pricing and external benchmarking)
  - Compensation plan design (including pay levels, pay mix, and measures and weights)
  - Financial models (including organization summary and rep-level impact)
  - Compensation calculator (including payout tables and sample calculations)
  - Communication material (including plan documents, FAQ sheet, terms and conditions, and train-the-trainer programs)
  - Sales rep survey
- Quota deliverables and tools:
  - Account and territory potential
  - Rep production capacity model
  - Quota setting and assignment methodology
  - Quota setting process
  - Quota stress testing
  - Sensitivity model (i.e., forecast vs. payout)
- Design committee global governance framework
- Communication plan

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. The compensation plans drive behaviors that align to the organization's objectives, strategy, and roles.
2. Our sales compensation plans are industry competitive and enable us to attract and retain top sales talent.
3. The ratio of base salary to target variable incentive (i.e., target pay mix) is tailored to the selling role.
4. The plan creates a strong relationship between pay and performance and has significant upside opportunity.
5. The plan contains no more than three measures, and each measure represents >20% of earnings opportunity.
6. Territories are balanced on revenue/bookings opportunity and earnings potential.
7. At least 50% of your sales reps achieved quota last year and at least 90% of reps earned some incentive.
8. We are able to forecast sales results and set quotas with 10% accuracy.
9. Sales leaders and reps can clearly articulate the compensation plan and plan mechanics.
10. We have the right systems to accurately measure results and administer the plans in a timely fashion.

**On a scale from 1-5, how important is compensation design and quota setting to your business?**

# Sales Support



## Revenue Operations

### Brief Description

Improve the efficiency of the sales team and provide insightful data.

### Benefit

Allows you to automate non-selling tasks and provide the right data at the right time to make the right decision.

### Deliverables

- Sales operations charter
- Data planning and reporting structure
- Dashboards
- Pipeline and forecast management process
- Deal desk process
- Quote-to-revenue process
- Organizational design of sales operations

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. Sales operations has a clear charter and is viewed as a key strategic function within the sales organization.
2. The sales operations team has a clear annual planning rhythm which provides coverage/territory data, headcount recommendations, and compensation plans before the new year starts.
3. You have a data management plan and reporting structure that provides actionable insights to sales leadership on a regular or ad hoc basis.
4. Sales dashboards are embedded into your CRM system and have been created using live data feeds.
5. You follow a disciplined process for managing and reporting sales pipeline status.
6. You follow a disciplined process for managing and reporting sales forecast status.
7. A deal desk has been established where sales management can develop and execute win strategies customized for individual accounts.
8. Selling time has increased because of current sales operations programs.
9. Sales leadership has confidence in your forecast accuracy rate, which enables better decision-making.
10. You have a reliable quote-to-revenue process, which includes sales, operations, finance, and legal departments.

**On a scale from 1-5, how important is revenue operations to your business?**



## Sales Enablement

### Brief Description

Increase revenue per head and decrease time-to-productivity for all key areas of your go-to-market engine.

### Benefit

Provide the right content at the right time to the field. Improve productivity per head by providing the tools that make the go-to-market team more effective. Design learning programs that are sustainable and scalable to keep up with the ever-changing market.

### Deliverables

- Revenue enablement charter
- Revenue enablement organization design
- Onboarding program
- Sales skills assessment
- Content development process

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. Your entire go-to-market team (marketing, sales, customer success, customer experience) is enabled with tools that deliver the desired business outcomes.
2. You have finalized a revenue enablement document that outlines the what, how, why, when, and where of the revenue enablement team.
3. The revenue enablement budget and organizational chart are built effectively enough to support the entire sales organization.
4. You are able to measure a direct correlation between revenue enablement and increased productivity rate (i.e., revenue per head) of the sales team.
5. You assess your sales team annually against a standard set of capabilities and accountabilities.
6. Sales tools such as use cases, case studies, and battlecards are continuously refreshed to reflect the latest products and customer success stories.
7. The ramp-to-productivity timeline continues to be shortened as a result of your revenue enablement initiatives.
8. Your training programs are digitized and constantly refreshed to keep up with the changing needs of the sales team.
9. A coaching methodology is followed by all sales management which has led to improved performance of your sales team.
10. You have rolled out a certification program that enables high performers to advance through the sales organization.

**On a scale from 1-5, how important is sales enablement to your business?**



## Sales Tech Stack

### Brief Description

Use technology to improve the speed of business and make it easier to do business internally and externally.

### Benefit

Only pay for tools that drive revenue. Integrate all of your systems for seamless process across key functional areas. Improve selling time by automating activities with improved data visibility.

### Deliverables

- Sales systems assessment
- Value and usage assessment
- Data cleanliness plan

### Thought Starters

Respond to the following statements with a yes or no and use your responses to guide your sales strategy transformation.

1. You have itemized all systems and services within your sales tech stack and integrated them with each other and with other critical systems outside of sales.
2. You actively track the utilization rates of critical sales technology systems in which you have invested.
3. Your sales technology tools are viewed as beneficial by the sales team.
4. Sales operations and sales have agreed on the most important objectives of your sales technology strategy.
5. Your current sales tech stack enables you to automate your compensation administration.
6. Your current sales tech stack enables you to streamline your order management process.
7. Your current sales tech stack enables you to effectively support your channel partner community.
8. Your data is maintained on a regular basis and monitored for data cleanliness.
9. You have an agreed upon method to rate the success of your company's sales technology strategy to achieve these objectives of the sales group.
10. The chosen technology is positively impacting the sales performance at your company.

**On a scale from 1-5, how important is the sales tech stack to your business?**