



Building Your Business Plan



Podcast Handout

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The purpose of this document is to help listeners to the Advanced Selling Podcast or The Ultimate Sales Chick podcast to improve their sales and sales planning skills.

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www.leadershipinstituteofindianapolis.com

Mental toughness is to physical toughness as four is to one. --Bob Knight

Every sales person needs a personal business plan they can follow throughout the year. We like to think of these as having **OUTPUTS** and **INPUTS**.

Outputs are the end goal—income, revenue, number of clients, conquests.

But **INPUTS** form the basis for the plan. Those are the activities and behaviors that are necessary components...the things you **CAN CONTROL**.

Read the elements below, then use the next page to fill out your personal plan.

Wise Thoughts...

"You never change something by fighting the existing reality. To change something, build a new model that makes the existing model obsolete."

Buckminster
Fuller

Personal Mission

This is similar to a company's mission statement but it's **ALL PERSONAL**. What is it about your business that drives you? Bring your soul into this one. What personally drives you to bring your best to the job everyday?

Be careful. Don't bring your family into this or anyone else. Make it about you and your talent—and how the bringing of that talent affects your customers.

Business Orders

We like to think that the Universe is a big Order Filling Machine. Yes, it takes work

and effort, but it begins with putting your orders in.

Personal Orders

Same thing here. Make this very personal. Make it about being in shape—or physical appearance, or family time. Make it specific. "Eat dinner with family 5 nights / week." Or, "Workout 5 days/week." Or, personal income number.

Controllable Behaviors

These are the business behaviors that are "no option behaviors." This could include:

- The use of a certain type of technology that you believe will help you.
- The number of calls per week you'll make
- The # of connectors you'll meet with in a period of time
- How you'll improve your deliverable

Connectors

We like to think that every sales professional needs to have a list of 5-10 connectors—those people who can help you reach your goals. These might be people who can refer you to others—or just people you want in your stable.

Threats

What threatens you? Better to know these devils that to have them sneak up on you. Burnout? Client fatigue (they're just tired of you so you have to keep it interesting)? Market instability? You probably won't have trouble with this list.

Conquest Account List

These are the "key accounts" or "key prospects" that you want to have a relationship with. Make a list of the company **AND** the people who you need to know. This is your Master Contact List.

Change Orders

These are the things that must change from the last year—or period. Maybe you wasted too much time with an account...or an industry segment...or maybe you failed to capitalize on something due to fear.

There are a host of other entries that could be put here...like **Core Motivations** (just so you're clear on what "juices" you); or **Resources** (those outside resources that you need in order to leverage your time and talent); and **Attitudes** (those new thoughts that you need to adopt in order to change your outcomes.

Good luck.
Bill and Bryan

WORKSHEET

Take the elements on the previous page and fill in the answers in your world.

PERSONAL MISSION

BUSINESS ORDERS

PERSONAL ORDERS

CONTROLLABLE BEHAVIORS

CONNECTORS

THREATS

CONQUEST ACCOUNTS

CHANGE ORDERS

Your Hosts



BILL CASKEY

Bill Caskey is a sales experimenter and trainer. He's worked with B2B sales groups for over 20 years.

He and his team of coaches train sales forces around the world in the art of communicating their value in a

rapidly changing world.

Caskey's philosophy has three components: 1) that today's buyer has more power than ever before and to be successful selling to him, the sales person must control the sales process; 2) that a sales person's success depends more on how he thinks than what he says; and 3) a sales person must always be working on their skills and educating themselves to the ways of the new world.



BRYAN NEALE

Bryan Neale has a portfolio of clients around the world. He's worked in a variety of industries in his tenure at Caskey, including healthcare, consumer goods, software and technology,

financial, and manufacturing.

Bryan's background includes a stint at Proctor and Gamble with stops in the financial industry and distribution.

He recently co-authored *Rewire The Sales Mind* with Bill Caskey.

In his spare time, he's a Division I college football official and spends time with his family of six.

Bill has worked with over 100 different industries in his 20-year sales training career.



Bill also contributes to www.INSIDEthesalesmind.com blog frequently. You can access the podcast at iTunes or at www.AdvancedSellingPodcast.com.



He has authored three books and many audio CD's: *Same Game New Rules*, published in 2001, *The Sales Playbook* in 2005, and *Rewire The Sales Mind*, with a release date of January 2010.

Our Services

We are a sales development firm located in Indianapolis, Indiana. You might know us as podcasters but that's a part time gig for us. Our team at Caskey, which includes Bryan, Bill, Brooke Green and Terry Sarbinoff work with companies in the sales and leadership disciplines.

From one-day events to ongoing coaching, we work with companies in a variety of industries and circumstances.

We are also doing more coaching on the phone/web/Skype as well.

If you would like to speak to us about your sales team, we'd love to connect. Call 317.575.0057 and speak with Kathy Macaluso about setting up a time to talk.