

# PLANNING

Bob Apollo | Inflexion-Point

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# WHY PLAN?

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“One of the great benefits of **not planning** is that failure comes as a **complete surprise** and is not preceded by a long period of **unnecessary worrying**”



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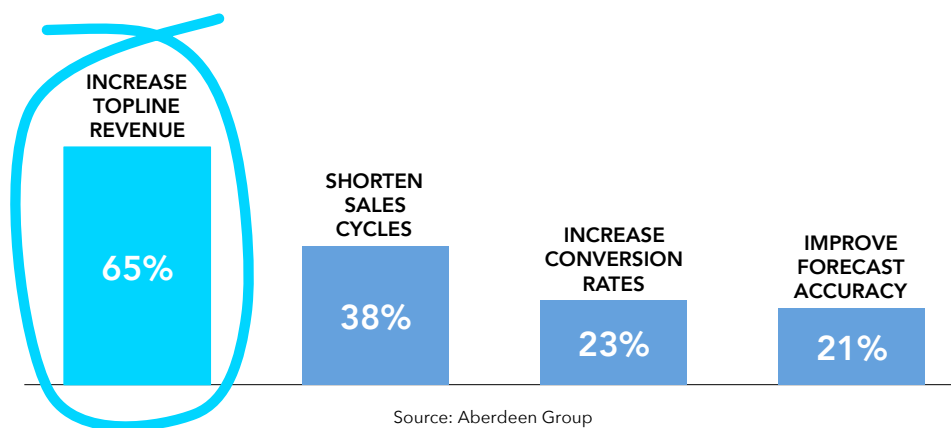
**ALIGN  
MENT**

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# WHY IS ALIGNMENT A GOOD THING?

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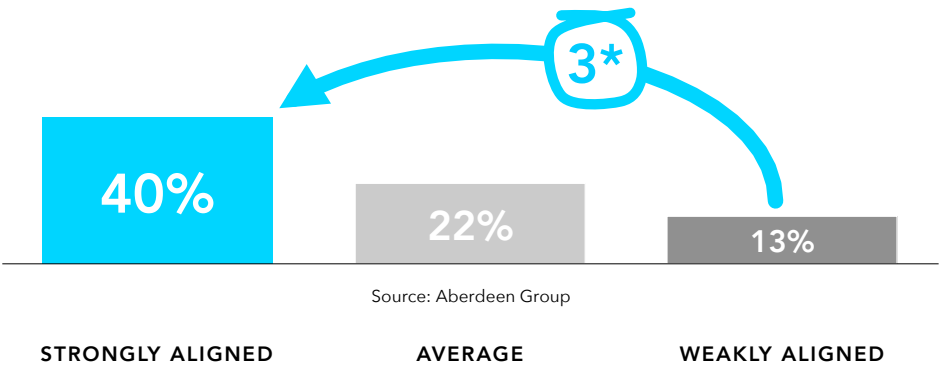
## WHY GET ALIGNED?



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# BENEFITS OF STRONG ALIGNMENT

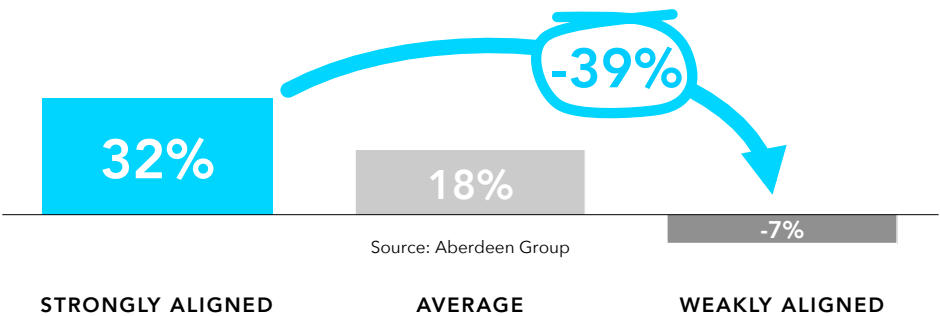
PERCENTAGE OF SALES PIPELINE GENERATED BY MARKETING



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# COSTS OF WEAK ALIGNMENT

AVERAGE ANNUAL REVENUE GROWTH



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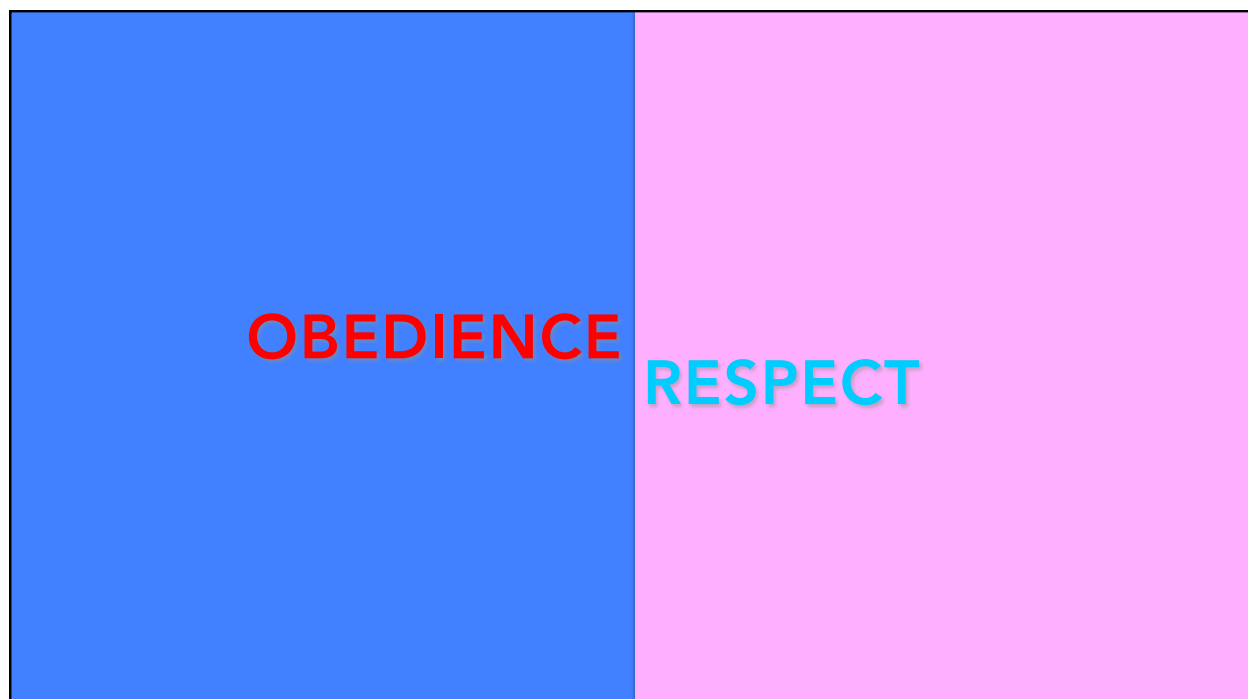
**BUT THERE'S A PROBLEM...**

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**85%** of the words used by  
sales and marketing  
to describe each other  
are negative

Source: Eloqua

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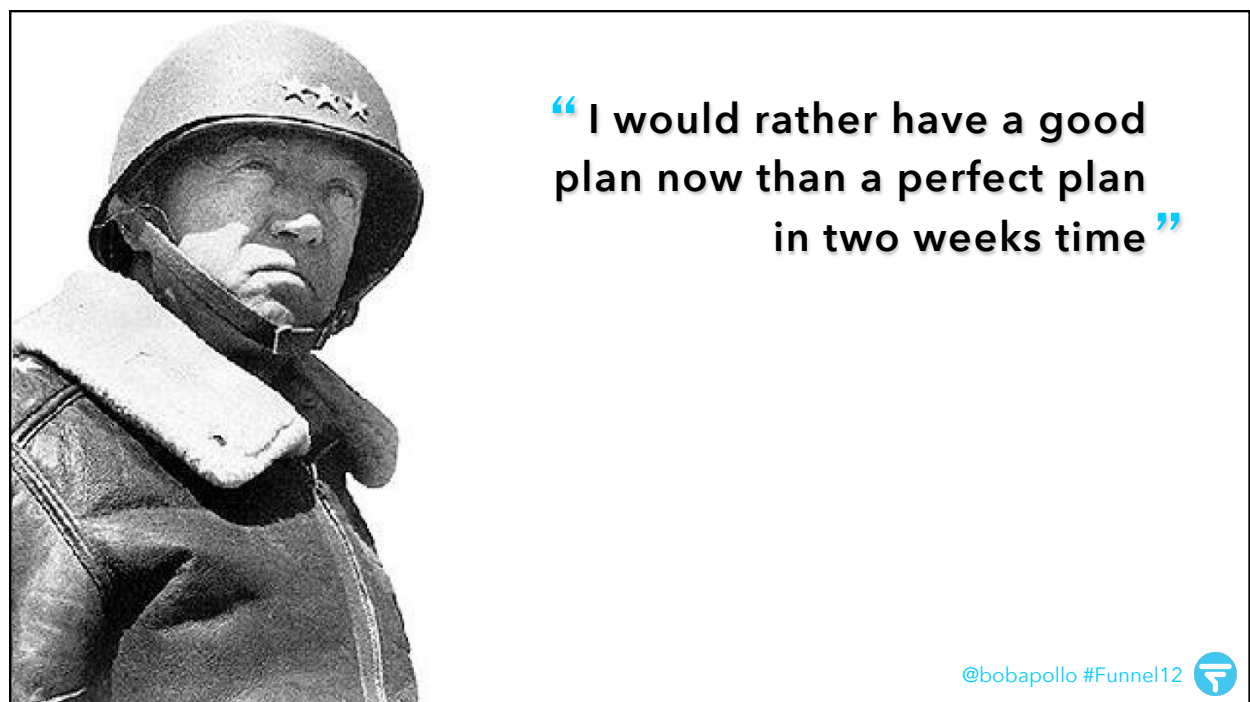


**WHY?**

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**CONFLICT**

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“ No plan survives  
first contact with  
the enemy ”

“ No plan survives  
first contact with  
the customer ”



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## THE COMMANDER'S INTENT

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☐ A clear purpose

☐ Common principles

☐ Scope for creativity

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ALIGNMENT  
SALES MARKETING  
STRATEGY EXECUTION  
ALIGNMENT  
SELLING BUYING  
PROMISE EXPERIENCE

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## WHAT DRIVES B2B BUYING DECISIONS?



Source: Corporate Executive Board

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## WHAT MAKES FOR A GREAT EXPERIENCE?

**"OFFERS UNIQUE, VALUABLE PERSPECTIVES ON THE MARKET"**

**"HELPS ME NAVIGATE ALTERNATIVES AND AVOID OBSTACLES"**

**"EDUCATES ME ON NEW ISSUES AND OPPORTUNITIES"**

**"EARNES WIDESPREAD SUPPORT WITHIN MY ORGANISATION"**

**"PROVIDES ON-GOING ADVICE AND CONSULTATION"**

Source: Corporate Executive Board

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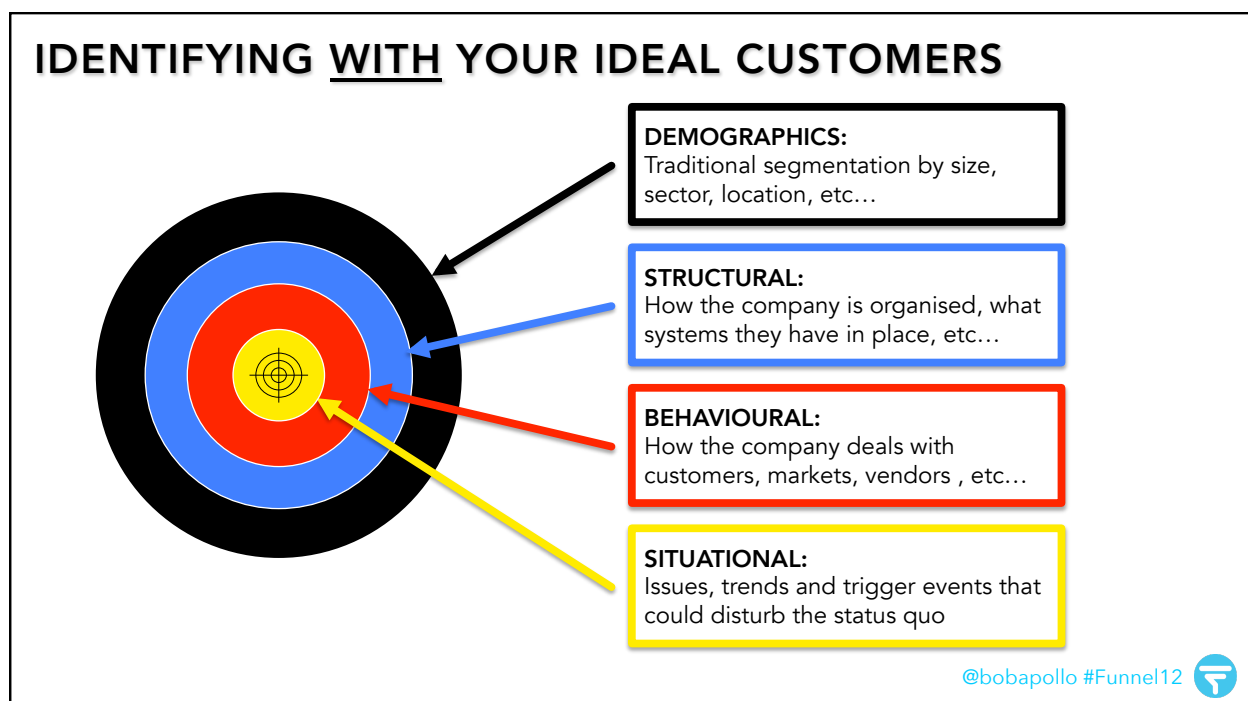


# **PLANNING FOR ALIGNMENT (AND A GREAT BUYING EXPERIENCE)**

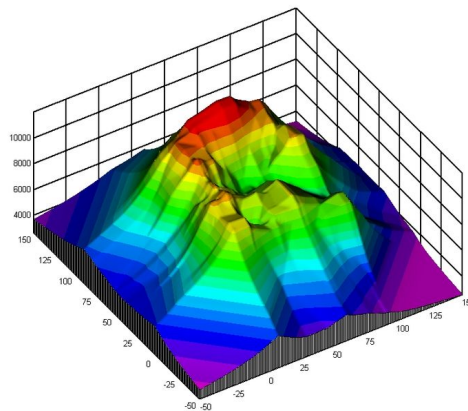
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## **1: AGREE ON THE ORGANISATIONS YOU'RE GOING TO TARGET**

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- ☛ Your target markets and customers are must be defined by their high points, not by their borders



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## EXAMPLE: IDEAL CUSTOMER



- ☛ Expansion-phase B2B technology business
  - ☛ Annual revenues in region of £2-20m
  - ☛ Lengthy, complex sales process
    - ☛ Multi-location sales team(s)
  - ☛ In markets that need educating
    - ☛ Ready to "cross the chasm"
  - ☛ Evidence of respect for process
  - ☛ Rapid growth becoming inconsistent
- ☛ Struggling to forecast revenues accurately

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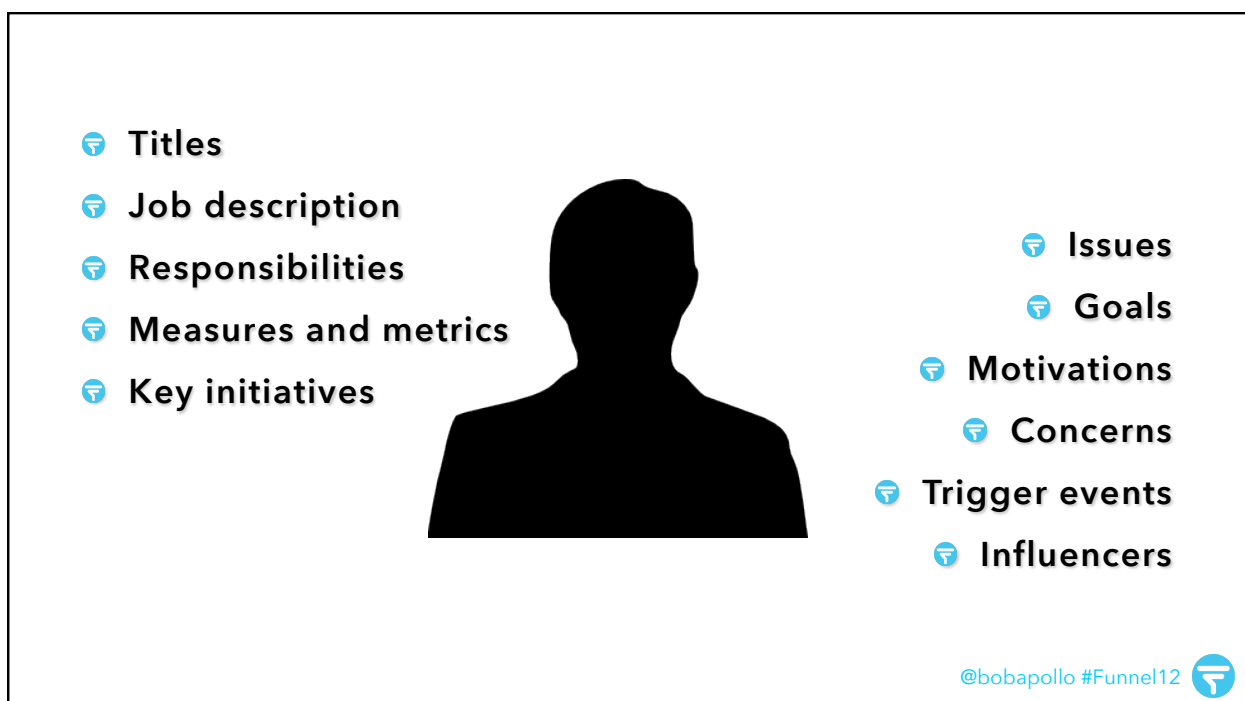
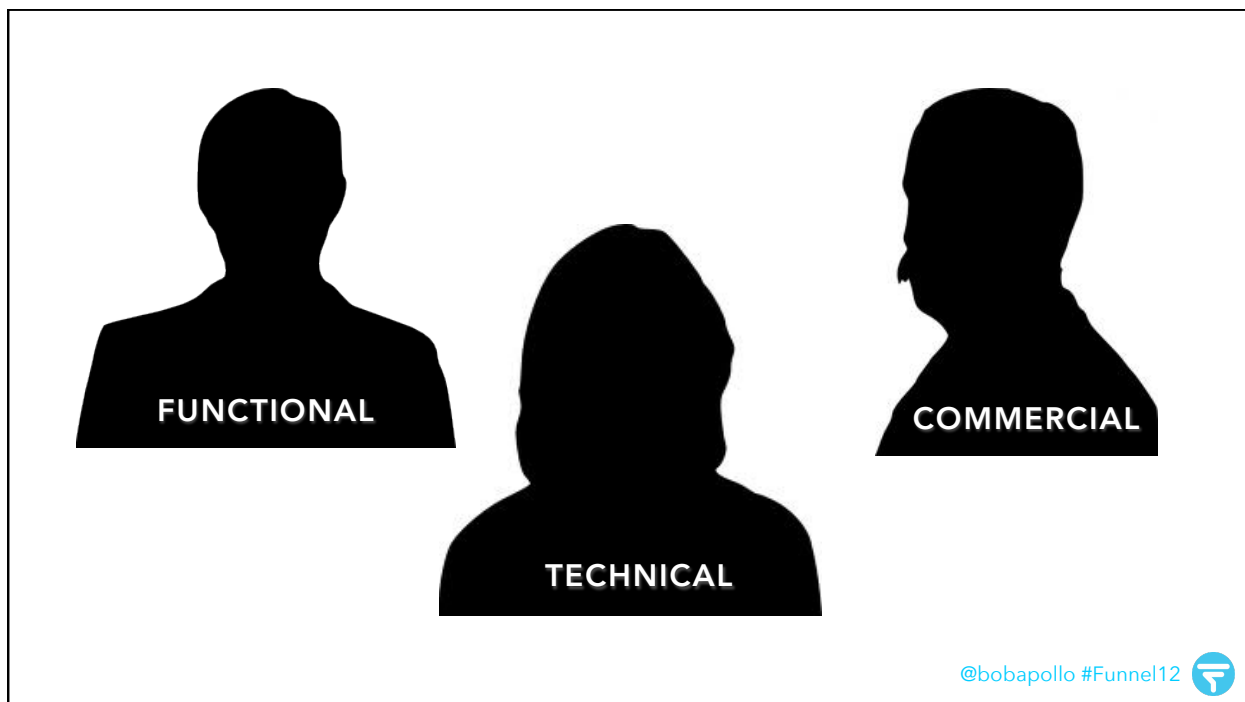
## INITIATIVE #1: **THE RIGHT CUSTOMERS**

**TARGET YOUR SALES AND MARKETING ACTIVITIES  
ON AN AGREED SET OF "IDEAL CUSTOMERS"  
DEFINED BY THEIR COMMON DEMOGRAPHIC,  
STRUCTURAL, BEHAVIOURAL AND SITUATIONAL  
CHARACTERISTICS...**

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## **2: PROFILE YOUR KEY STAKEHOLDERS USING ROLE-BASED BUYER PERSONAS**

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## EXAMPLE: **KEY STAKEHOLDER**



- 🔑 CEO/Founder
- 🔑 Ambitious to realise full potential
- 🔑 Frustrated by inconsistent performance
- 🔑 Inquisitive, open to listen to others
- 🔑 Already convinced they need to change
- 🔑 Tried and failed internal initiatives
- 🔑 Prepared to take decisive action

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## INITIATIVE #2: **THE RIGHT STAKEHOLDERS**

GET YOUR SMARTEST SALES PEOPLE AND  
MARKETERS TO **COLLABORATE** ON IDENTIFYING  
AND UNDERSTANDING THE **KEY STAKEHOLDERS**  
IN THE **BUYING DECISION PROCESS**

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## INITIATIVE #2: **THE RIGHT STAKEHOLDERS**

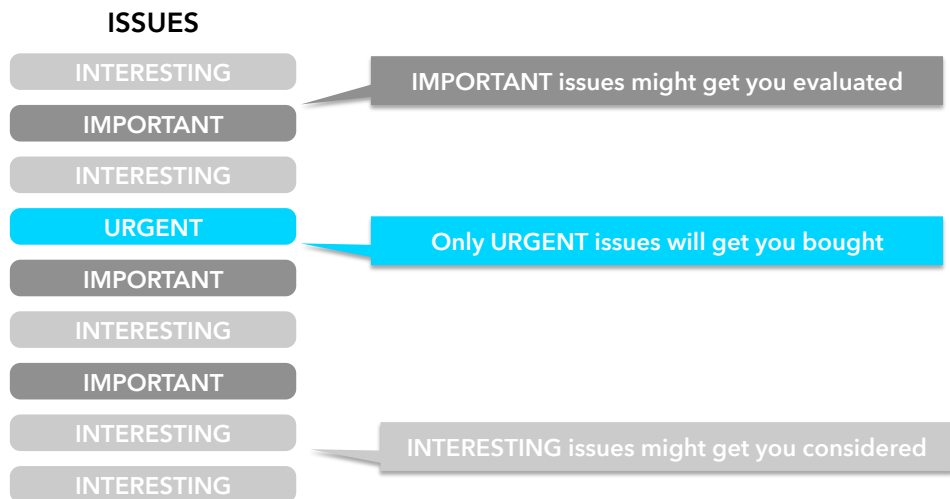
GET YOUR SMARTEST SALES PEOPLE AND  
MARKETERS TO COLLABORATE ON IDENTIFYING  
AND UNDERSTANDING THE KEY STAKEHOLDERS  
IN THE BUYING DECISION PROCESS ... **AND THEN**  
**SYSTEMATICALLY TEST** YOUR UNDERSTANDING  
THROUGH **CUSTOMER CONVERSATIONS**

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## **3: AGREE ON THE **ISSUES** YOU'RE GOING TO ADDRESS**

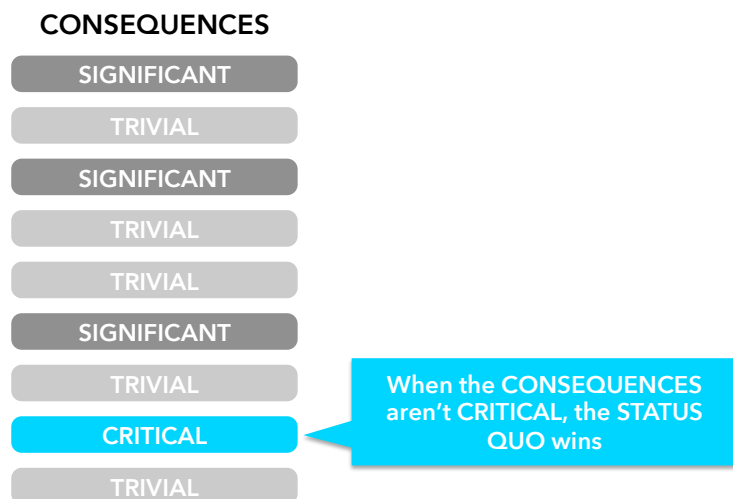
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## ISSUES



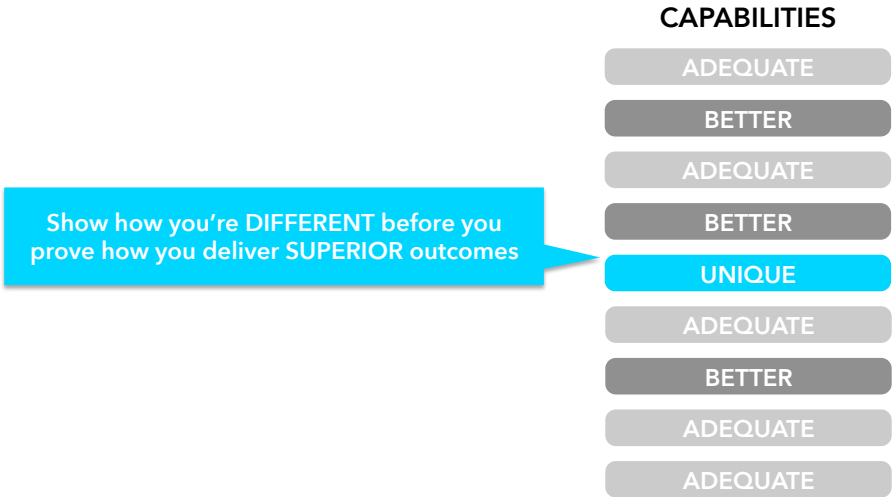
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## ISSUES, CONSEQUENCES



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# ISSUES, CONSEQUENCES AND CAPABILITIES



# ISSUES, CONSEQUENCES AND CAPABILITIES

ISSUES	CONSEQUENCES	CAPABILITIES
URGENT	CRITICAL	UNIQUE
IMPORTANT	SIGNIFICANT	BETTER
IMPORTANT	SIGNIFICANT	BETTER
IMPORTANT	SIGNIFICANT	BETTER
INTERESTING	TRIVIAL	ADEQUATE
INTERESTING	TRIVIAL	ADEQUATE
INTERESTING	TRIVIAL	ADEQUATE
INTERESTING	TRIVIAL	ADEQUATE
INTERESTING	TRIVIAL	ADEQUATE

## EXAMPLE

- 🔹 **URGENT ISSUE:**  
Inability to accurately forecast sales revenues
- 🔹 **CRITICAL CONSEQUENCE:**  
CEO starting to become concerned about their performance
- 🔹 **CORE CAPABILITY:**  
Buying behaviour focused, evidence-based forecasting process

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## INITIATIVE #3: THE RIGHT ISSUES

DEVELOP **INSIGHTS** THAT CONNECT **ISSUES** THAT  
ARE **URGENT** FOR YOUR IDEAL CUSTOMERS WITH  
CRITICAL **CONSEQUENCES** FOR WHICH YOU HAVE  
UNIQUELY STRONG **CAPABILITIES** THAT RESULT IN  
**SUPERIOR OUTCOMES**

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### INITIATIVE #3: **THE RIGHT ISSUES**

DEVELOP INSIGHTS THAT CONNECT ISSUES THAT ARE URGENT FOR YOUR IDEAL CUSTOMERS WITH CRITICAL CONSEQUENCES FOR WHICH YOU HAVE UNIQUELY STRONG CAPABILITIES THAT RESULT IN SUPERIOR OUTCOMES... AND MAKE SURE YOUR SALES **CONVERSATIONS** ARE **ALIGNED** WITH YOUR MARKETING **MESSAGES**

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**4: ONE TEAM  
ONE FUNNEL  
ONE PLAN**

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## ONE TEAM



- ☐ Common focus
  - ☐ Identify, attract, engage, qualify and win more of the right sort of customers
- ☐ Common goals and metrics
  - ☐ Directly related to revenue
  - ☐ Based on outcomes, not activities
- ☐ Common definitions
  - ☐ Marketing Qualified Lead [MQL]
  - ☐ Sales Accepted Lead [SAL]
  - ☐ Sales Forecastable Opportunity [SFO]

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## ONE TEAM



- ☐ Clear roles and responsibilities
  - ☐ Mutual, documented expectation-setting
- ☐ Regular reviews at every level
  - ☐ Monitor progress
  - ☐ Brainstorm bottlenecks
  - ☐ Identify opportunities for improvement
- ☐ Clear hand-offs
  - ☐ No black holes
  - ☐ "No lead left behind"

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## ONE FUNNEL

- ☛ Based on phases in **buying behaviour**, not stages of sales activity
- ☛ Progress measured by **observable evidence** of buying behaviour
- ☛ Intense focus on **measures, metrics** and accumulated **learning**
- ☛ Pipeline **velocity** and **conversion** rate analysed at every stage
- ☛ The whole team focuses on identifying and **obliterating obstacles**



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Less than  
**50%**  
of deals close  
as forecasted

Source: CSO Insights



Best Month ever...  
**13** out of **14**  
deals closed as forecasted\*  
\*the missing deal was the lowest valued opportunity

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## ONE PLAN



- ☐ Ideal customers
- ☐ Key stakeholders
- ☐ Core issues
- ☐ Identify
- ☐ Attract
- ☐ Engage
- ☐ Qualify
- ☐ Win

Break down revenue and profit targets into required **activities** and **outcomes** at every stage of the customer acquisition process

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## PULLING IT ALL TOGETHER

### FOCUS

IDEAL CUSTOMERS

KEY STAKEHOLDERS

ISSUES, CONSEQUENCES AND CAPABILITIES

### PROCESSES

BUYER-ALIGNED SALES PROCESS

MESSAGE MAP

CONVERSATION PLANNERS

QUALIFICATION CHECKLISTS

PIPELINE MANAGEMENT

REVENUE FORECASTING

### PROGRAMMES

CONTENT MARKETING

INBOUND MARKETING

SOCIAL MEDIA

PHONE MARKETING

SALES TRAINING

COACHING MENTORING

CRM

MARKETING AUTOMATION

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## IN SUMMARY:

- 🔹 TARGET THE RIGHT CUSTOMERS
- 🔹 APPEAL TO THE RIGHT STAKEHOLDERS
- 🔹 FOCUS ON THE RIGHT ISSUES
- 🔹 ONE TEAM
- 🔹 ONE FUNNEL
- 🔹 ONE PLAN

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REVENUE IS A TEAM SPORT

ONE ONE ONE  
TEAM FUNNEL PLAN

SUCCESS DOESN'T HAPPEN BY ACCIDENT

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# INFLEXION▶POINT

Helping smart companies build **SCALABLE** sales and marketing machines

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