

Strategic Selling Plan Development Worksheet



Strategic selling plan

A strategic selling plan is a disciplined system of selling that takes into account all of the dynamics in the total customer-sales professional relationship. The strategic selling plan has three primary elements:

Objective

Strategy

Action Step

Objective

A concrete, measurable result to be achieved by a specific point in time.

Example: To expand our company's position in Rampart and gain a commitment for \$200,000 additional business by September 1.

Strategy (macro plan)

A general course of action to be pursued in order to achieve a particular objective.

Developing successful strategies in a competitive environment requires questioning old methods, exploring creative actions, facing up to strengths and weaknesses, instituting changes to people and organizations, and taking risks.

Example: Over a period of three months, to obtain the support and endorsement of Dale Taylor and Chris Carr for our unique new system "The Exeter Planning Model," for completely revitalizing Rampart's financial management procedures.

Action step (micro activity)

A specific event, activity or step to be taken in order to implement the strategy. It oftentimes results in a sales call.

Example: Set up a meeting with Chris Carr on (date) for the purpose of establishing a more friendly working relationship and identifying what is important to Chris as it relates to financial planning.

Team assignment (use form on reverse)

As a team, respond to questions (1) and (2) and develop a Strategic Selling Plan for your assigned case study (3). Record your team assignment on a poster. Select a spokesperson who will present your team's findings to the total group. Refer to the **Needs, Values, and Motivations** theory paper in developing your responses to the team assignment.

Team

Assignment

1 Would you classify this customer's personality as **security, affiliation, power, or actualization?**

On what specific behavioral observations did you base this classification?

2 Team - Assessment of Situation:

Problem:

Opportunities:

3 Strategic Selling Plan

Objective:

Strategy:

Action Step:

(Note: For purposes of this case study, generate three to four Action Steps for implementing your team strategy. Assume that each Action Step will be successful).

Date	Action Step	Purpose