



30-60-90 Sales Plan Presentation Guide

Have you been asked to prepare a sales development plan for your interview? Use this handy guide to create a winning presentation.



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Introduction.

It's common for employers to ask sales candidates who are at the 2nd interview stage to prepare a sales development plan. This is to get applicants to visualise themselves within the business and start creating an action plan on how they will approach the role.

This provides employers with a good insight into your methods, and tactics and your genuine understanding of the role and sales process. Typically, employers are looking for a well-thought-out and logical plan of attack. However, this doesn't need to go into too much detail in terms of the turnover you will produce. At this stage of the process, you will be unable to give an accurate or meaningful number due to unknowns which include things such as the value of the accounts that you will inherit and current area turnover.

We would always recommend breaking the plan down into three core slides, these could include 0-30, 30-60, and 60-90 days ensuring the presentation can be delivered within the time stipulated by the employer.

It is always beneficial to ensure the presentation is in line with the employer's branding/colours and isn't text-heavy to encourage you to talk around each point.

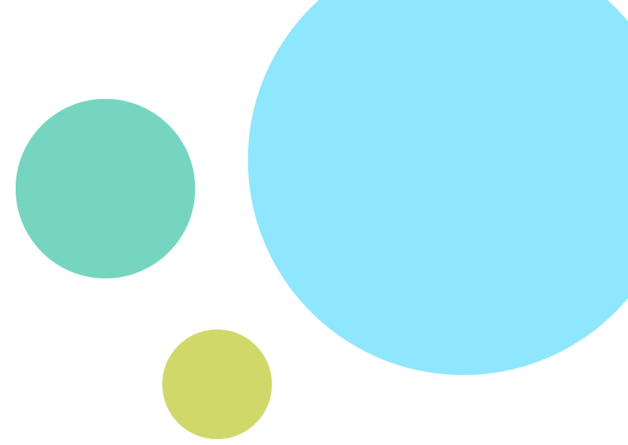


Days 1-30

In the early days of any role, it's important to gain the basic foundations to allow you to build a successful career. This could include activities such as learning new systems (CRM etc), processes, and products, analysing the current sales pipeline, and also meeting the team and the key individuals you will be working with. Therefore, in this section of the presentation, it's important to raise points around learning, meetings, and customer/sales analysis. Examples could include:

- ☐ Learning the systems & processes.
- ☐ Understanding the company mission, values & proposition.
- ☐ Completing product training & identifying key USPs.
- ☐ Build strong internal relationships.
- ☐ Shadowing other team members.





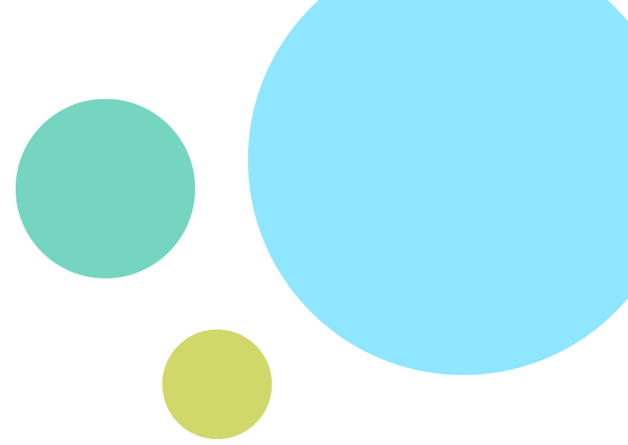
Days 31-60

Now the foundations have been built, it's important to focus on how you will start to put in the groundwork to directly impact sales. This slide should focus on planning, identifying prospects, understanding their needs, and making contact. This could include activities such as:

- ☐ Analysing current sales pipeline.
- ☐ Market research and identifying key growth sectors.
- ☐ Gaining an introduction to existing customers, forming relationships and understanding their needs/challenges.
- ☐ Identifying and repairing relationships that are at risk.
- ☐ Reviewing successful case studies and using these to identify new prospects.
- ☐ Prioritise leads and organise pipeline.
- ☐ Territory planning.
- ☐ Setting short and long-term goals.
- ☐ Establish early wins.



Days 61-90



Reflecting on your initial 90 days, areas of improvement and additional learning should be a key element of this slide. Along with activity related to new customer identification and prospecting.

This could include activities such as:

- ☐ Identify areas of personal improvement.
- ☐ Continuous learning.
- ☐ Creating financial and activity-based objectives alongside your Sales Manager.
- ☐ Competitor Analysis - How does the business compare, what are their strengths and weaknesses.
- ☐ Prospecting and engaging with new customers.

Other things to consider.

Outside of these three slides it is recommended to include an introduction or "Why recruit me?" slide to showcase your experience. This should focus on your relatable skills, experience and successes. Although including points around your soft skills such as communication, and ability to operate autonomously is a good starting point, we would recommend you include facts, figures, and evidence of your success and capabilities.





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0161 870 5000

MASE-CONSULTING.COM

Jactin House, 24 Hood Street, Ancoats, Manchester, M4 6WX