



Document 16-09

# Business Development Plan Form

**Instructions:** The “Business Development Plan” is used to communicate to the inside sales telephone representative’s (ISRs) improvement actions from an observation. The “Sales Audit Checklist” highlights the sales process and activities. The numbers on the Sales Audit Checklist correspond to the numbers on the “Telephone Sales Skills Database.” Use the Telephone Sales Skills Database to collect praise statements for the Opening paragraph, Development Actions, Development Action Plans, Outcomes and Achieving the Goals – Resources to Use or use your own.

**Opening Paragraph:** Praise statements for positive ISR accomplishments.

**Development Actions:** Items the ISR needs to address to improve his or her performance.

**Development Action Plans:** A methodology for accomplishing the development actions.

**Outcome:** What the ISR can expect when he or she accomplishes the development actions.

**Achieving the Goals – Resources to Use:** Resources the ISR can use to learn how to complete the development actions. The database lists resources found in Business Performance Groups online library.

**Follow-up Activities:** Activities the coach and ISR will do to follow up on the development actions.

Included in this document is an example “Business Development Plan” and a blank form for you to use.

# Business Development Plan

Name: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Department: \_\_\_\_\_

ISR has efficient organizational skills. ISR has a positive attitude toward the company and its products/services. ISR has an effective sales strategy impacting customers, prospects, and suspects.

## Development Actions:

1. Ask good questions to uncover product solutions as benefits to the customer.
2. Use reference stories to provide proof and generate excitement.
3. Use a compelling reason to call to open each sales call.

## Development Action Plan:

- Solutions are attributes of our products and services. To find out if they are benefits, we must ask the customer good questions. Then we can present the benefit by saying "You said ..." – immediately generating interest and enthusiasm for our offerings.
- Reference stories are powerful analogies that peak customer interest and provide a measure of proof mere statements from the salesperson cannot match. Remember, 35% of the human brain is dedicated to visual images. Plant exciting and memorable images for your customers using stories – stories that refer to your products and services and the value they provide to your customers.
- When you use a good compelling reason to call to open a conversation, the customer will be engaged and interested. What is compelling for the customer to listen? Ask yourself this question and then craft a call opening around this statement. Remember, it is all about them – it's all about the customers!

## Outcomes:

- By using solutions – advantages – benefits – questions, you will generate more excitement and focus the sales conversation on what most interests the customer – and increase sales.
- When you use reference stories, you will create great visual images that will result in more confident customers and higher sales.
- When you open with a good compelling reason to call, the customer will be engaged and interested, leading to higher sales.

## Achieving the Goals – Resources to Use:

- Sales Modules from Business Performance Group’s Online Library:
  - Value Proposition for Inside Sales Representatives
  - Outbound Telephone Selling for Inside Sales Representatives

## Follow-Up Activities

☆ Meeting to review progress – Friday 3 p.m. – Sales Manager’s Office

We are committed to completing these actions.

Representative: \_\_\_\_\_

Coach: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

# Business Development Plan

Name: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Department: \_\_\_\_\_

< Praise >

## Development Actions: <Up to 3 development actions>

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

## Development Action Plan:

- \_\_\_\_\_  
\_\_\_\_\_
- \_\_\_\_\_  
\_\_\_\_\_
- \_\_\_\_\_  
\_\_\_\_\_

## Outcomes:

- \_\_\_\_\_  
\_\_\_\_\_
- \_\_\_\_\_  
\_\_\_\_\_
- \_\_\_\_\_  
\_\_\_\_\_

## Achieving the Goals – Resources to Use:

- < Resources the ISR can use to learn how to accomplish the development actions >

## Follow-Up Activities

- ☆ < Follow up activities for the coach and ISR >

We are committed to completing these actions.

Representative: \_\_\_\_\_

Coach: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_