

# 2020 Plan

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Estimated reading time: 10 minutes

*Note: Specific company info and some links are hidden to protect the former employer.*



## Timeline



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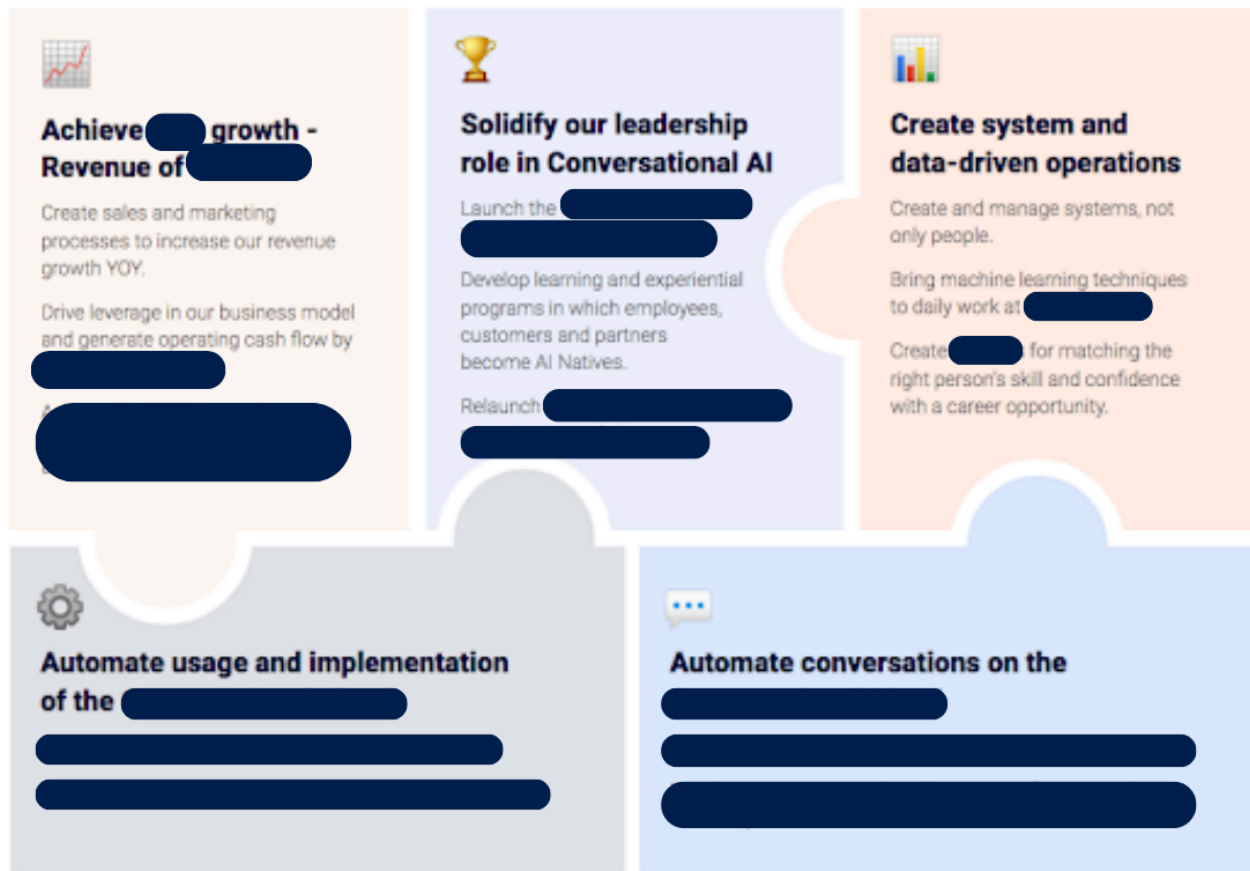


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## ✓ 2020 Corporate Goals



## 💡 Start with the intent

I should work more closely with the executive team in an effort to produce big results for the organization while building large, life-changing personal wealth for all involved. I will work against a company quota of \$5M and a personal target of \$20M in new bookings to help the GRO organization meet its lofty goals for 2020.

## 💎 We maintain high standards

We have collectively identified that my skill set is best suited for our top strategic pursuits <link removed>, whether new logos (direct and partner) or within the existing base. The executive team will remove barriers to put me in the best position for us to succeed in winning and maximizing 7-figure, 8-figure, and 9-figure bookings within those targeted accounts. There will be less of a focus on early-stage sales development and more of a focus on me entering warm conversations with key stakeholders.

## We are system thinkers

To achieve these large personal goals and maintain high standards, I need to be more "integrated into the organization." This means a more fluid and flexible role that will cross and impact multiple teams, not just the current NA Hunter team I sit on today.

## We are strong team players

Once the strategic pursuits have been identified and confirmed, I will execute on what has been a proven successful formula - working cross-functionally to inspire resources and entire teams to put forth our best showing in creatively speeding up sales cycles and maximizing bookings. This will require assistance from shared resources, but they will be prioritized to pursue these strategic deals when called upon.

## We obsess over the customer

Some deals will require my continued strategic oversight post-deal one (or even two). Most deals that land big out of the gate may not need a heavy quota-carrying CP to come in immediately after but, instead, require a strong delivery team and project lead focused on delivering the transformational vision agreed to during the strategic sales process.

## !! We are decisive

Coming off of a massive year like 2019, which literally took a big deal all the way to the goal line, my pipeline has thinned out. However, instead of just following every warm opportunity that crosses my desk, I am being deliberate and strategic with my time. This means taking risks and bets that may result in foregoing smaller and faster opportunities that can land inside the first half of the year so that I focus my time on landing larger whales in the second half of the year.

## We test and learn

We will work with <name removed> and the Communications team to amplify my voice in an effort to elevate myself inside strategic opportunities, whether it be thought leadership content like articles in known publications, speaking engagements, compelling events, and so forth.

## We are data-driven

2019 results <link removed>:

- \$8.68M bookings (represents ~<# removed>% of the company's total \$<# removed> in bookings for the year, Source: InsightSquared)
- 6 deals

- 4 new logos
- ~\$1.5M average deal size
- For each hour of work I dedicate, I generate \$4,373.08 in bookings for the company and \$859.69 in personal gross income

💡 : My time is the most precious resource and needs to be protected and used strategically for the most valuable pursuits and important endeavors

## Reaching personal goals

### **Optimize experience + effort + systems while closing gaps**

Reaching my goals in 2020 will need to align with the company's theme of "Momentum." What this means to me is I have a lot of strong tailwinds that are setting me up for continued success this year.

#### Experience

- Several large transformation deals under my belt
- Deep experience and expertise on our POV, value prop, products, and solutions
- Thorough understanding of the SMEs who can help support and close large deals within the organization
- Strong relationships, trust, and support of many folks across the organization
- A handful of named accounts in active pipeline (<account names removed>)

#### Effort

- **Jan:** Strategy & Planning
  - Re-engage w/ active pipeline from 2019
  - Begin building new leads (i.e. NRF and San Diego Exec Community event)
  - Lock in the target account list
  - Start enablement and certifications (**Note:** not prioritized over revenue-generating activities)
- **Feb:** Building Blocks
  - Build systems and processes
  - Start executing strategic outreach
  - Complete enablement and certifications (**Note:** not prioritized over revenue-generated activities)
- **Mar - Dec:** Execution
  - Focused effort with minimal distractions, no internal friction, and full company support
  - Close deals (big and many)

#### Systems

- Use my current stats as a baseline
  - Current average deal size is ~\$1.5M ARR
  - I closed 4 net new logos and 6 opportunities last year

- Set up my year and calendar in an effort to generate predictability
  - If I use 10 months of realistic, concentrated heavy selling, that means I will need to
    - **Increase** total number of deals (i.e. 5 new logos and 10 opportunities closed), and/or
    - **Increase** total deal size (i.e. \$2M average deal size)

2020			Improvement over 2019
O	Objective	\$20M in bookings	+ 130%
K	Key	10 deals	+ 4 deals
		5 new logos	+ 1 logo
R	Results	\$2M average deal size	+ \$500K per deal

How can I do this? See below...

## Tools for success

### Strategy

- Strategic, Named Account Target List <link removed>
- Elevated Sales Experience <link removed>

### Productivity

- [EVO Planner](#)
- [Timeular](#)
- [Todoist](#)
- [Sunsama](#)

### Health and well-being

- [WHOOP](#)
- [Headspace](#)
- [Omvana](#)

### Communications

- [SuperPhone](#)
- [Sprout Social](#)
- [Loom](#)

### Coaching

- [Andy Paul](#), Tactical
- Louisa Nicola, Brain and Wellness
- [Amber Deibert](#), Mindset and Confidence

### Sales Process

- [Outreach](#)
- [Close Plan](#)
- [LinkedIn Navigator, Team Addition](#)
- [Prezi](#) (where an enhanced level of customization required beyond new POV for a more conversational presentation experience)

## PR and Executive Thought Leadership

- [Massive Alliance](#) (Executive Leadership Branding)
  - \$66K/year

## AI and Systems

- Virtual Assistant: TBD
- AI-Powered Sales Assistance: TBD
- Other: TBD



## Themes for the year

- **2020 is the year of the partner sale.** Traditionally, working with partners has been a time drain with zero effectiveness. However, the <partner removed> partnership is proving to be a strong best-of-breed partner whom I've struck up a good rapport with and who has deep contact center reach at major brands (i.e. <accounts removed>). Closing my first partner deal is a key target so that a template for success can be created. 7- to 8-figure deals in a few strategic pursuits are realistic.
  - Keys to success:
    - Maintain good executive rapport and alignment with their key figures
    - Leverage <name removed> for maintaining good communication hygiene and deal progression
    - Ensure <name removed> is empowered, and we can strategically enable Gainshare deals as a creative commercial lever to boost deal size
- **2020 is the year of the company's first 8-figure booking.** Although 8-figure deals (TCV) have been achieved in the past via others with the likes of <account removed> and <account removed>, I want to deliver the first 8-figure booking (ARR) for the company and myself.
  - Keys to success:
    - Leverage a good strategic partner like <partner removed> to enable a major contact center transformation
    - Stay in accounts post deal one
    - Use the <account removed> template without any of the headaches: Paid Due Diligence/Accelerator for 3-4 months at a flat minimum of \$500K and then offer that back as a credit when they execute the long-term transformation inside a set date in 2020
- **2020 is the year of important habits.** "Our job isn't to be a machine - it's to give the machines something brilliant to do." (Eric Barker, *Barking Up the Wrong Tree*). Time is my most precious resource, and energy/health is a close second. I can't operate like a machine, but I can certainly endeavor to build one!
  - Keys to success:
    - Always prioritize activities that align with my strategic initiatives and produce the largest bookings above all else (i.e. deal progression over enablement)

- Treat myself right, much like a world-class professional athlete must manage effort, nutrition, sleep, and recovery - I need to operate in a similar manner
- Take time to celebrate the win, but not too long. Recognize, reflect, share, enjoy, and then get back to work
- Maintain a continual, open dialogue with the Executive team to ensure 100% transparency, alignment, and no barriers to my output

## Action Plan (by Quarter)

Just focus on one quarter at a time for a detailed plan. The most current quarter action plan is displayed at the top.

### Q1

#### Outcome Goals

1. Close one deal
2. Have my named strategic account list mapped out
3. Complete all internal enablement and certifications
4. Make meditation upon waking a daily habit, just like brushing my teeth
5. Make writing a daily habit, just like having my morning coffee

#### Process Goals

1. Close a deal within the next 75 days
  - a. Fast-track <account name removed> MSA and lock in a \$500K Innovation Lab/Paid Due Diligence program
  - b. Enable a Velocity Package for <account name removed> via the <partner removed> warm engagement (meeting in Feb in <location removed> for defining our path forward).
  - c. Come out of the San Diego event with an <product name removed> fast-track program for the four brands I have attending as a legal/security/procurement-friendly way to start step one of the conversational transformation program.
2. Create a Close Plan, Todoist Project, and Conversational Memo (~4 hours each account) for my top 10 accounts by March 31st (any additional accounts in future should be easily replicated from the templates I create for these top 10).
3. Time-block my calendar for working through enablement and certification assignments with an end date of completing all assignments by Feb 4th.
4. Meditation as a habit
  - a. Set alarm to wake 30 mins earlier than usual
  - b. Use the [Streaks app](#) to gamify the experience
  - c. Leverage my weekly sessions with Louisa to keep myself accountable
5. Writing as a habit
  - a. Complete a daily entry in my EVO Planner

- i. Set time for 5 mins for each entry to prove to my brain it's not a big effort
- ii. Use [Streaks app](#) and the internal tools built into the planner/journal to gamify the experience
- iii. Reward myself with a tangible gift when I reach a 21-day streak

### The Why

1. Regardless of deal size, closing a deal inside Q1 builds confidence and puts me inside that company to expand to a 7- to 8-figure opportunity
2. By doing a lot of the heavy lifting on strategy and having a crisp view of how I can progress in my top pursuits in the first two months, I can progress throughout the rest of the year with clarity, high energy, excitement, and confidence. This will keep me focused on maintaining high standards and build the foundation for inspiring future personal content (articles, videos, a book) that is important to my long-term personal endeavors.
3. By completing enablement assignments and certifications ensures I am fully up to speed on the vernacular and our product features. This gives me credibility and increased confidence in front of clients and ensures I don't have the mental drain of overdue tasks weighing over me.
4. By starting my day by practicing mindfulness and a calm focus will allow me to consistently operate at a higher consciousness in every task I complete for that day, ensuring I make sound decisions while communicating more clearly and effectively with prospects and colleagues. In addition, I am improving the power of my brain.
5. By starting the day by writing my intentions for the day (and week, month), I script and organize my actions for the day. This will make it easier to complete the most important tasks that achieve my short- and long-term goals. In addition, I am improving the power of my brain and laying a foundation for future content.

### Gaps

- **Process:** I am strong at strategizing, presenting, and closing once a deal is in an advanced sales stage, but poor at maintaining good communication during stages 2 & 3.
  - **What to do:** Get trained in Outreach so I can leverage automation and pre-planned communications based on rules to amplify my communication efforts during the earlier sales stages, and I prevent pipeline fallout.
- **Skills:** I want to be a stronger networker.
  - **What to do:** Review [Connecting & Engaging content](#) in The Sales House
- **Systems:** There needs to be an easier way to start my journey with warmer conversations (i.e. how can I bypass stages 1 - 2 and get straight to stage 3 with a prospect?).
  - **What to do:** Ask for one executive reference from each of my closed deals

### Define Immediate Next Steps

Action Item	Due Date	Status
Discuss future role framework with <name removed>	Jan 16	Completed



<del>Discuss 2020+ plan with &lt;name removed&gt;</del>	<del>Jan 24</del>	Completed
Discuss 2020+ plan with Andy Paul over dinner in San Diego	Jan 28	Scheduled
<del>Complete 2019 Assessment in HR Soft</del>	<del>Jan 20</del>	Completed
<del>Complete 2020 Goals in HR Soft</del>	<del>Jan 20</del>	Completed
<del>Set up a project for each of my target accounts in Todoist</del>	<del>Jan 24</del>	Completed
<del>Reach out to &lt;name removed&gt; to get Outreach training set up on calendar</del>	<del>Jan 20</del>	Completed
<del>Schedule on calendar reference asking</del>	<del>Jan 24</del>	Completed
Listen to How to Build Authentic Relationships and How to Start More Sales Conversations	Someday	Captured



## Scorecard

### Mid-Year

To complete July 1, 2020

Targets			Results	Achievement/Gap
O	Objective	\$20M in bookings		
K	Key	10 deals		
R	Results	5 new logos		
		\$2M average deal size		

Intention	Completed? (Y/N)
Did you complete all of the outcome goals you set for the previous quarters?	
Did you grow professionally?	
Did you develop personally?	

Rate yourself in these main performance categories	Score (1 - 3) 1- Poor 2- Ok 3- Excellent
Delivering results <i>How well are you tracking to your OKRs?</i>	

How much are you contributing to satisfying the corporate goals?	
Effort <i>Do you believe you applied all of your time and energy effectively to achieving your targets?</i> <i>If you stopped working today, would you be satisfied with your performance this year?</i>	
Discipline and focus <i>How well did you manage your time?</i> <i>Did you maintain a trusted system that helped accomplish your tasks?</i>	
Health and well-being <i>Did you maintain a healthy lifestyle?</i> <i>Are you stressed out or excited for what's to come next?</i>	
Client relationships <i>Do your prospects trust you?</i> <i>Would they consider you an expert?</i>	
Colleague relationships <i>Do your teammates trust you?</i> <i>Would they consider you an expert?</i>	

<b>Reflections, Notes, Thoughts, and Ideas:</b>

## End-of-Year

**To complete December 31, 2020**

Targets			Results	Achievement/Gap
O	Objective	\$20M in bookings (personal)  \$5M in bookings (company)		
K	Key	10 deals		
R	Results	5 new logos \$2M average deal size		

Intention	Completed? (Y/N)
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Did you complete all of the outcome goals you set for the previous quarters?	
Did you grow professionally?	
Did you develop personally?	

Rate yourself in these main performance categories	Score (1 - 3) 1- Poor 2- Ok 3- Excellent
Delivering results <i>How well are you tracking to your OKRs?</i> <i>How much are you contributing to satisfying the corporate goals?</i>	
Effort <i>Do you believe you applied all of your time and energy effectively to achieving your targets?</i> <i>If you stopped working today, would you be satisfied with your performance this year?</i>	
Discipline and focus <i>How well did you manage your time?</i> <i>Did you maintain a trusted system that helped accomplish your tasks?</i>	
Health and well-being <i>Did you maintain a healthy lifestyle?</i> <i>Are you stressed out or excited for what's to come next?</i>	
Client relationships <i>Do your prospects trust you?</i> <i>Would they consider you an expert?</i>	
Colleague relationships <i>Do your teammates trust you?</i> <i>Would they consider you an expert?</i>	

<b>Additional Notes, Thoughts, and Ideas:</b>

## Additional ideas

### **How to improve the Field Sales Team this year:**

1. **Let's use one of our strongest assets, our guiding principles as a framework for account strategies.** One of the biggest takeaways of my onboarding almost two

years back, was when <name removed> spoke to us about our principles being used as a way to solve problems internally and with our clients. I think our principles encourage an AE or CP to really think through strategically what's going to close a deal and identify gaps in the current close plan. Think about the deal end-to-end. This takes time and planning. It's then up to the individual to prioritize/rearrange the principles and put their own story to the script. That should be the fun part! This should also be baked into Salesforce (or something better...more below). I also think using shareable tools, like a memo or treating our sales sequence of events like a project with our clients, also helps us to get in alignment with them faster and shows deeper collaboration. <name removed> and I used an Executive Memo well to close the large <account name removed> deal.

2. **Gamify the sales process.** Passing through the [sales stages](#) should feel like a fun game that we are excited to play every day. AI, automation, and analytics are used to improve our game and reveal our true bandwidth and capacity. We should have a scoring of accounts and a competition across the org for daily, real-time feedback on how our accounts are growing and maturing over time. For instance, to move from Stage 2 to 3, we, as quota-carrying reps, should know exactly what actions need to happen to level up and pass through the gate. We should have the equivalent of MCS for our accounts. Moving to the next stage should be a satisfying experience, and it relies less on manual input into Salesforce and leverages tools and AI that connect all of our activity, calendars, etc. Essentially, just allow us to do our job with a little guided input, and the technology is there to support us and take administrative tasks off our plates. Very similar to how <product name removed> is meant to be a tool to support agents in becoming conversational designers and bot managers, we should have tools to accelerate deals and boost our close scores. Essentially, an SDR becomes a bot manager (<name removed> idea) and then an AE has a personal sales assistant bot helping to close deals (more on this below).
3. **Leverage more AI and automation to support our salespeople.** I should have a sales bot as a personal assistant who is always with me, guiding me through the sales stages. "Have you collected the MNDA yet? Here are tips to speed that up." "Has an ROI analysis been built? Here are plays to encourage your Mobilizer to get you the data you need." Etc. I should also be fed a weekly report that shows me key trends and how much time I spend in a particular sales stage and then get coached on how to shorten it (either through automation or a human). "<Account name removed> has been stuck in Stage 3 for 133 days. What seems to be preventing progress?" Additionally, services like LinkedIn Sales Navigator and AI should also be able to detect who I am targeting and how I am connected to this person. If, for instance <name removed> is a first-degree connection with a C-level executive at one of my target accounts, it notifies me. Lastly, we should also be able to add feedback easily to what works and doesn't work in winning accounts, so we have a built-up digital playbook that is always at our disposal. For instance, if I am targeting a Telco, then use the DNA of the close strategies used to close <account name removed>. Targeting an airline, let's tap into the plays ran that won <account name removed>. This should all be digital and conversational in nature so that we don't have to get hunted down individually, "Hey Brandon, tell me about how you used that open letter to <account name removed> VPs..."

4. **Resource recommendations.** While going through the sales stages, finding the right SME to help could be one of the biggest barriers to slowing down deals, particularly for new reps trying to feel their way through the org in the first 120 days. For instance, once you've satisfied certain activities in a particular sales stage, the rep should be alerted about who should be pulled in based on the solutions identified. We should then be presented with clear visibility of their calendar and then be able to send pertinent information that strikes up meaningful collaboration.

## The High-Achiever's Mantra

I will persist until I succeed.  
I will do the hard things first.  
I will never make excuses.  
I will do what others don't like to do.  
I will give more than I take.  
I will always be learning.  
I will lead by example.  
I will act with integrity.  
I will be fearless.  
I will put my all into it.  
I will act now.

I will be great.

## Reference Material

2019 results and assessment <link removed>

Named account list <link removed>

[Diamond hunter framework](#)

[Diamond account sales experience ideas](#)

[Sales stage criteria](#)

Conversational close plan memo template <link removed>