



Take Action Results  
*Profit! Freedom! Lifestyle!*

# Decision Making and Planning

Most Owners do not Plan to Fail  
They just Fail to Plan!

Why? Most do not know how to Plan

# Great Decision Making

Einstein once said if I had an hour to solve a problem and my life depended on this solution, I would spend the first 55 minutes determining the proper question to ask, for once I know the proper question, I could solve the problem in less than five minutes.

**Plan Meticulously Execute Flawlessly**



# Great Decision Making

**Decision** = Objective -> Factors ->  
Conclusions -> Options -> **Plan**



# Step 1 – The Objective

## The Objective (Aim, Goal, Mission)

Create a plan to increase sales by 20 percent for presentation to the Executive Team next Friday morning



# Step 1 – The Objective

## Objective Analysis

- **Questions?**
- **Limitations?**
- **Assumptions?**



## Step 2 – The Factors

Factors -> Conclusions

**SO WHAT?**



## Step 2 – The Factors

### Factor Categories

- **Competitive Landscape**
- **Customer Profile**
- **Current Staff**
- **Current Budget**





# Category – Competitive Landscape

## Factor – Highly Competitive Marketplace – SO WHAT?

1. Conclusion 1 – Must Differentiate – SO WHAT?
  - a) Sub-Conclusion 1 – Competitive Analysis – SO WHAT?
    - i. Ask Marketing Coordinator to Complete – **ACTION ITEM**
  - b) Sub-Conclusion 2 - Revisit Unique Selling Proposition – **ACTION ITEM**
  - c) Sub-Conclusion 3 - Revisit Value Propositions – **ACTION ITEM**
2. Conclusion 2 – Messaging to Ideal Customers – SO WHAT?
  - a) Need Marketing Strategy – SO WHAT?
    - i. Sub-sub-Conclusion 1 – We outsource marketing now – SO WHAT?
      - 1) Can current contractor do this? SO WHAT?
        1. Find another Marketing Agency – **ACTION ITEM**
    - ii. Sub-sub-Conclusion 2 – Budget? SO WHAT?
      - 1) Work with Marketing to estimate – **ACTION ITEM**



# Category – Customer Profile

## Factor – We know our customers well – SO WHAT?

1. Conclusion – Marketing must Target – SO WHAT?
  - a) Create plan with Marketing – **ACTION ITEM**



# Category – Customer Profile

## Factor – High Touch Multiple Step Sale – SO WHAT?

1. Conclusion 1 – Need Prospect Tracking System – SO WHAT?
  - a) Need CRM – SO WHAT?
    - i. Must research and identify budget – **ACTION ITEM**
2. Conclusion 2 – Must be Simple to Buy – SO WHAT?
  - a) Sub-conclusion 1 – Need website update – SO WHAT?
    - i. Discuss with Marketing – **ACTION ITEM**
  - b) Sub-conclusion 2 – Need Prospect to Sales Consistency – SO WHAT?
    - i. Sub-sub-conclusion 1 – Assign all prospects – SO WHAT?
      - 1) ....2 more SO WHAT lead to **ACTION ITEM**
    - ii. Sub-sub-conclusion 2 – Calendaring system.. Leads to **ACTION ITEM**



# Category – Customer Profile

## Factor – High Touch Multiple Step Sale – SO WHAT?

- a) Sub-conclusion 3 – Need Sales Process – SO WHAT?
  - i. Create process – **ACTION ITEM**
- b) Sub-conclusion 4 – Need Sales Training – SO WHAT?
  - i. ..2 more SO WHATs lead to **ACTION ITEM**



# Conclusions and Action Items

## Conclusions and Action Items

- Need to discuss the following with Marketing
  - Our USP
  - Our Value Prop for each of our 3 primary product lines
  - Our core differentiators
  - An updated Lead Generation plan including budget
- Need to find and cost out a CRM
- Need to define a sales process
- Need to create a new sales compensation plan including impact, if any, on budget
- Need to find and cost out a calendaring system for prospect management – might be a feature of a CRM.
- Need to create a sales training program and cost out



## Step 3 – Courses Open and Options

### Option 1 – Hire 2 More Salespeople

- **Pros**
  - **No change to existing sales systems**
  - **Little effort for Marketing**
  - **Simple to Manage Budget**
- **Cons**
  - **Will it actually work?**
  - **If does not work will be harder to make changes later**



## Step 3 – Courses Open and Options

### Option 2 – New Tactical Marketing Plan and Sales Management System

- **Pros**
  - **Budget neutral or less**
  - **Create systems that can be easily adopted**
  - **Can be scaled for even more growth later**
- **Cons**
  - **Complex to implement**
  - **Potential for sales people turnover**



## Step 4 – Recommendation and Plan

1. Make a Recommendation or Decision
2. Prepare Draft Plan based on process
3. Finalize Plan and then Execute

