

One of The Institute's **worksheets** series, to help you improve your leadership skills and capability, making you a better leader

This worksheet, based on the Spotlight 'Sales and Marketing Plans,' will help you focus on developing the sales and marketing plan, achieving sales and marketing goals, and improving your sales and marketing strategy.

You should take approximately **two hours** to complete this worksheet and read the accompanying Spotlight

Developing the Plan

Before launching a new product or service, a plan is needed. **Complete the table below** to outline what should be included at each stage and how that information would be obtained:

Stages of the Plan	What this should include	How the information is obtained
Sales Objectives		
Market Analysis		
Product Range		
Activity Analysis		
Training Plan		
Resource Requirements		
Analysis of sales strategy		

Achieving Sales and Marketing Goals

It is important for the leader to provide the team with the right guidance to achieve sales and marketing goals. **Read the statements below to assess how effectively you feel you currently do this. Rank the statements 1-6, where 1 = most effective and 6 = least effective:**

	Rank		
I allocate work that allows my team members to work autonomously			I analyse the activities of the team and will modify plans for improvement
I discuss my plans to ensure we are agreed on necessary actions			I analyse the markets fully to ensure realistic targets are set
I am able to manage the budget so that we achieve our outcomes			I always aim to improve partner engagement and sales effectiveness



Worksheet

Managing Customer Relationships: Sales and Marketing Plans

I am most effective in the following areas because:

I am least effective in the following areas because:

How will you improve your effectiveness in the two areas that have scored lowest?

Improving Your Sales and Marketing Strategy

Sales and Marketing tactics are changing; the use of social media for building awareness, for example, is growing at rapid pace. In relation to your own role, reflect on the aspects in the table below, consider what needs to happen to ensure your strategy is fit for the future, and summarise your findings:

Aspects	Reflection
Use of Social Media	
Sharing plans with partner networks	
Systems used to gather, evaluate and track leads	
Policies to ensure collaborative working between departments	
Effective target marketing campaigns	
Sales processes	
Technology	

What needs to stop happening:	What needs to be continued:	What needs to happen in the future:

Review How would you start a conversation to advise a team member about an upcoming change to your marketing plan that may impact on their targets and results?

All references are cited in The Institute of Leadership (2018) 'Spotlight on Sales and Marketing Plans'

Collaboration – Managing Customer Relationships – Sales and Marketing Plans

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