

Sell Your Business 4 Millions: Integrated Sales & Marketing Framework

This document will become an implementation plan for building an integrated Sales and Marketing department to increase the value of your company. The goal is to maximize company valuation for a successful exit. The strategy is to document the Owner and Team's expertise, experience and company knowledge.

This plan template is an interactive tool to guide and record discussion in the areas as identified below. Each business will eventually produce a custom plan based on their industry, company and the Owners' desires.

1. SITUATION ANALYSIS

Objective: Understand market environment, customer psychology, & competitive landscape.

1.1 Market Environment

- **Market Identification:** Who is the market we are selling into? What is its total size?
- **Segmentation:** Can the market be segmented? Along what lines? What are the specific characteristics of each segment?
- **Product Portfolio Matrix:** Which products are our **Stars** (High growth/High share), **Cash Cows** (Low growth/High share), and **Dogs** (Low growth/Low share)?
- **Growth Dynamics:** What is the market's growth trend (declining, flat, or growing)? At what exact percentage annually?
- **Trend Analysis:** What trends are observed or foreseen in the following areas:
 - Economic
 - Social
 - Political
 - Technological
- **Market Developments:** What potential future developments could disrupt or impact this market?
- **End-Users:** How many total end-users exist within our primary market segment by geography?
- **Distribution Influence:** Who are the important influencers in the distribution chain? What weight do they carry?
- **Pipeline Allies:** What elements of the product pipeline—from manufacturer to consumer—have a vested interest in the business? Can they be considered allies?

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1.2 Customer Demographics, Attitudes, & Expectations

- **Demographic Profile:** Who are our customers demographically? What are their psychological and sociological characteristics?
- **Needs vs. Wants:** What are the customers' needs and wants regarding product attitudes? Does our offering address them?
- **Value-Add Elasticity:** If you add features or services, will customers pay more, or will it attract a higher volume of new customers?
- **The Purchase Cycle:** What is the typical customer purchase cycle? Do they exhibit brand loyalty, or are they likely to switch? Are they open to new products?
- **Perception:** What are the customer attitudes toward our products versus those of our key competitors? Why do they buy from us?
- **Acquisition Strategy:** What would attract current non-customers to our brand and lapsed customers back?

1.3 Competitive Situation

- **Competitor Landscape:** Who are the key competitors? What is our market share relative to theirs?
- **Competitive Ranking:** How do we rank against competitors in terms of our total offering (Price, Quality, Service)?
- **Product Differentiation:** What specifically differentiates our product from the rest?
- **Competitor Intelligence:** What are the specific strengths and weaknesses of competitor products?
- **Strategic Position:** Define our overall competitive position in 2–3 concise sentences.

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2. OBJECTIVES & KEY ISSUES

Objective: Define the "North Star" metrics for the sales and marketing departments.

2.1 Sales & Marketing Targets

- **Revenue Goals:** Define revenue targets by product type, customer category, and territory.
- **Granular Targets:** Set goals by product, SKU, market, and quarter.
- **Growth Split:** Define targets for existing client retention versus new "conquest" business.
- **Market Share:** What specific market share percentage are we attempting to attain compared to last year?
- **Objective Prioritization:** What is the relative importance of each objective (Rank them)?

2.2 Key Issues & Stakeholders

- **Opportunities & Threats:** List 3–5 key issues for each of the following stakeholders:
 - Owners
 - Customers
 - Employees
 - Society/Community
- **Customer Turnover:** What is the customer turnover rate (churn)? What is the financial cost of losing a customer?
- **Critical Success Factors:** What are the factors that will give us the most leverage over the competition?
- **Risk Assessment:** What are the manufacturing, warehousing, or distribution risks?

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3. STRATEGIC FRAMEWORK

Objective: High-level strategies for products, pricing, and departmental alignment.

3.1 Product & Price Strategy

- **Competitive Advantage:** What specific strategies will ensure our product beats the competition?
- **Pricing Philosophy:** Will we lead, follow, or ignore competitor pricing?
- **Variable Pricing:** Does it make sense to vary prices by market, customer type, or timing?
- **Service Integration:** How do we price ongoing project management, innovation and creative development as part of our service offering?

3.2 Integrated Lead Process & Alignment

- **Lead Generation:** How are leads generated (In-house, 3rd party, events)?
- **Event ROI:** Do we attend events to generate leads? Is there a sufficient ROI for those events?
- **Lead Nurturing:** How are leads nurtured? At what qualification level are they transitioned from Marketing to Sales?
- **Departmental Synergy:** How does Sales provide feedback to Marketing regarding collateral and presentation materials? (Note: It is essential for these departments to talk).
- **Alignment Metrics:** What shared/complimentary metrics ensure both departments are moving in the same direction?

3.3 Communications & Territory Strategy

- **Territory Accountability:** How are sales divided across markets? Who is accountable for setting those targets?
- **Multi-Media Strategy:** What are the specific strategies for:
 - Advertising & PR
 - Trade shows & Conferences
 - Media & Government relations
 - Social Marketing & Online/Website strategies
- **Core Messaging:** The essential messages that must be communicated consistently across all media.

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4. HUMAN CAPITAL & SALES MANAGEMENT

Objective: Auditing the team and management processes for "transferable value."

4.1 Team Structure & CRM

- **Leadership:** Is the team led by the owner(s) or dedicated sales management?
- **Support Staff:** Is there administrative or "Inside Sales" support for the field team?
- **Sales Behavior:** Are the reps Needs-Based sellers, Relationship sellers, or Fast-Close sellers?
- **Service Responsibility:** Is the sales team responsible for after-sales service?
- **CRM Discipline:** Which system is used? Who has access? Is every contact expected to be input? Are you getting a good return on the CRM investment?

4.2 Hiring, Compensation, & Performance

- **Hiring Disciplines:** What specific forms or testing are used when hiring?
- **Turnover Analysis:** What is the historical turnover? Have exit interviews been conducted to understand the "why"?
- **The "Best" Rep:** Who is the best salesperson? Is this opinion based on metrics, personality, or first-hand observation?
- **Compensation Model:** Strictly base, base + bonus, base + commission, or "base ++"?
- **Alignment:** Does the model align behaviors with company financial objectives (e.g., higher margins)?
- **Incentives:** Are there specific incentives for "conquest" business vs. "recurring" business?
- **Market Ranking:** Are we paying at the market average or top quartile?

4.3 Management & Coaching (The SYB4M Philosophy)

- **Management Role:** Is the manager a pure coach or a player-coach?
- **The SYB4M Training System:** The sales plan is only a set of objectives; it is the **SYB4M** training, coaching, and follow-up activities that make it work. How is the implementation part of the strategy?
- **Success Metrics:** If the team refuses implementation/coaching, how does that impact metrics?
- **Executive Involvement:** How often does the Senior Team travel with reps to meet clients?

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5. TACTICAL ACTIVITY PLANS (IMPLEMENTATION)

Objective: The actionable "Over-Plan" to drive growth.

5.1 Integrated Activity Calendar

- **The SYB4M Over-Plan:** Intentionally plan **more activities** than can currently be executed. Use milestones to determine when to trigger the next set.
- **Calendarization:** Develop a calendar listing by week or quarter of all Sales and Marketing/Communications activities.
- **Prioritization:** Prioritize by quarter based on what drives growth fastest with the lowest cost. Lowest hanging fruit.

5.2 Specific Sales & Marketing Tactics

- **Sales Tactics:** Include targets by product and territory. Define the step-by-step activity set for:
 - Initial Meetings
 - Discovery Phase
 - Proposals
 - Closing Rates & Metrics
- **Marketing Tactics:** Include all tactics by action, budget, audience, media vehicle, and blocking chart.

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6. FINANCIAL REQUIREMENTS

Objective: Budgeting for execution.

- **Capital Requirements:** Long-term investments needed.
- **Selling Expenses:** Current year as well as 1, 2 and 3-year outlooks for Sales/Marketing.
- **Production Costs:** Manufacturing and R&D costs associated with growth.
- **Profitability:** Overhead and net profit contribution.

THE BUYER'S PERSPECTIVE:

A Buyer will look into your Sales and Marketing efforts right from the beginning of due diligence. A weak or owner-dependent department means additional work and expense for the Buyer.

Using the **Sell Your Business 4 Millions** framework builds an integrated department that justifies a higher multiple and a premium sale price. And in many cases gives the Owner their sanity back in the process.