

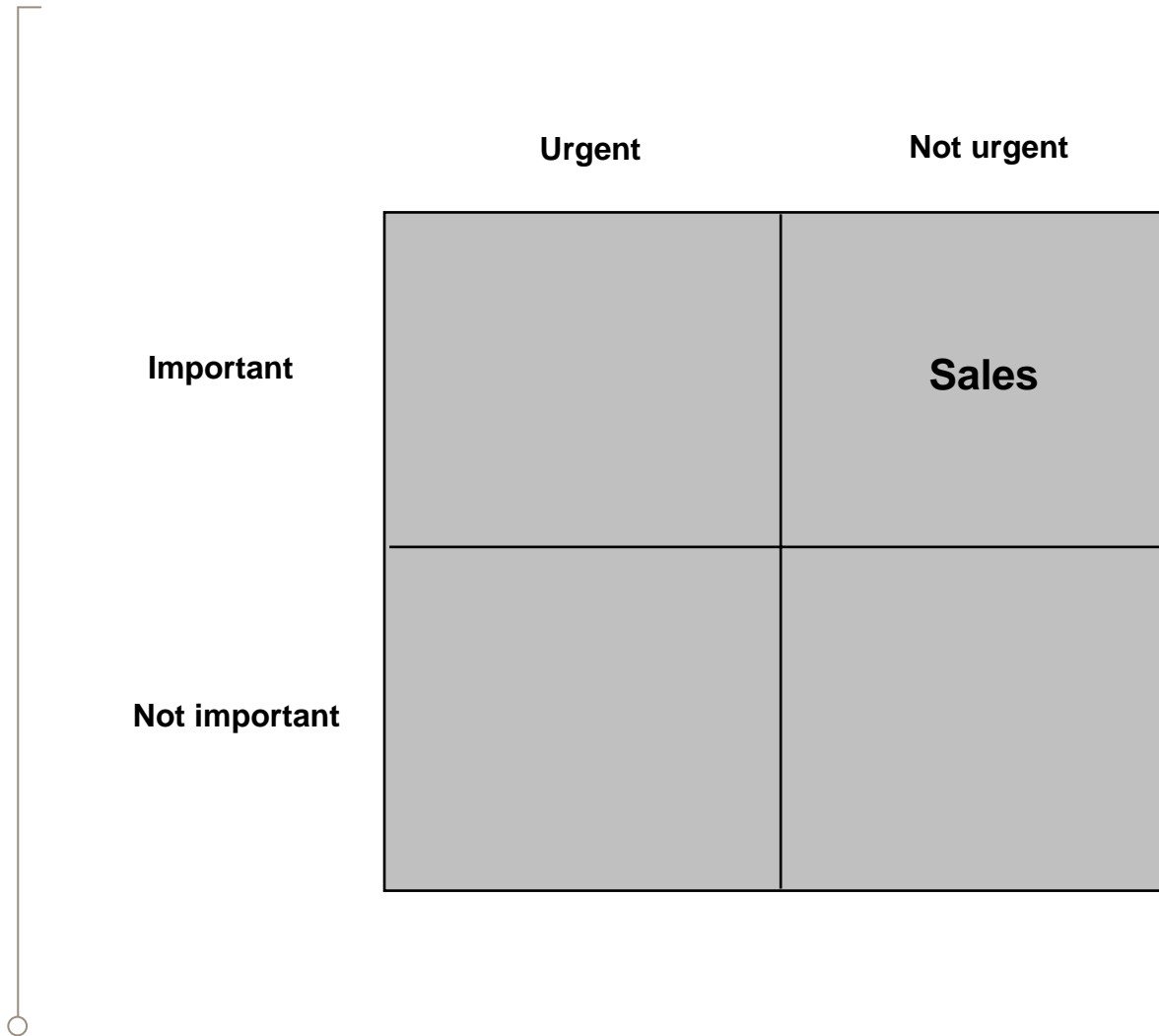
# Practical Pursuit Planning

Scott Jensen  
Director of Sales  
Moss Adams LLP

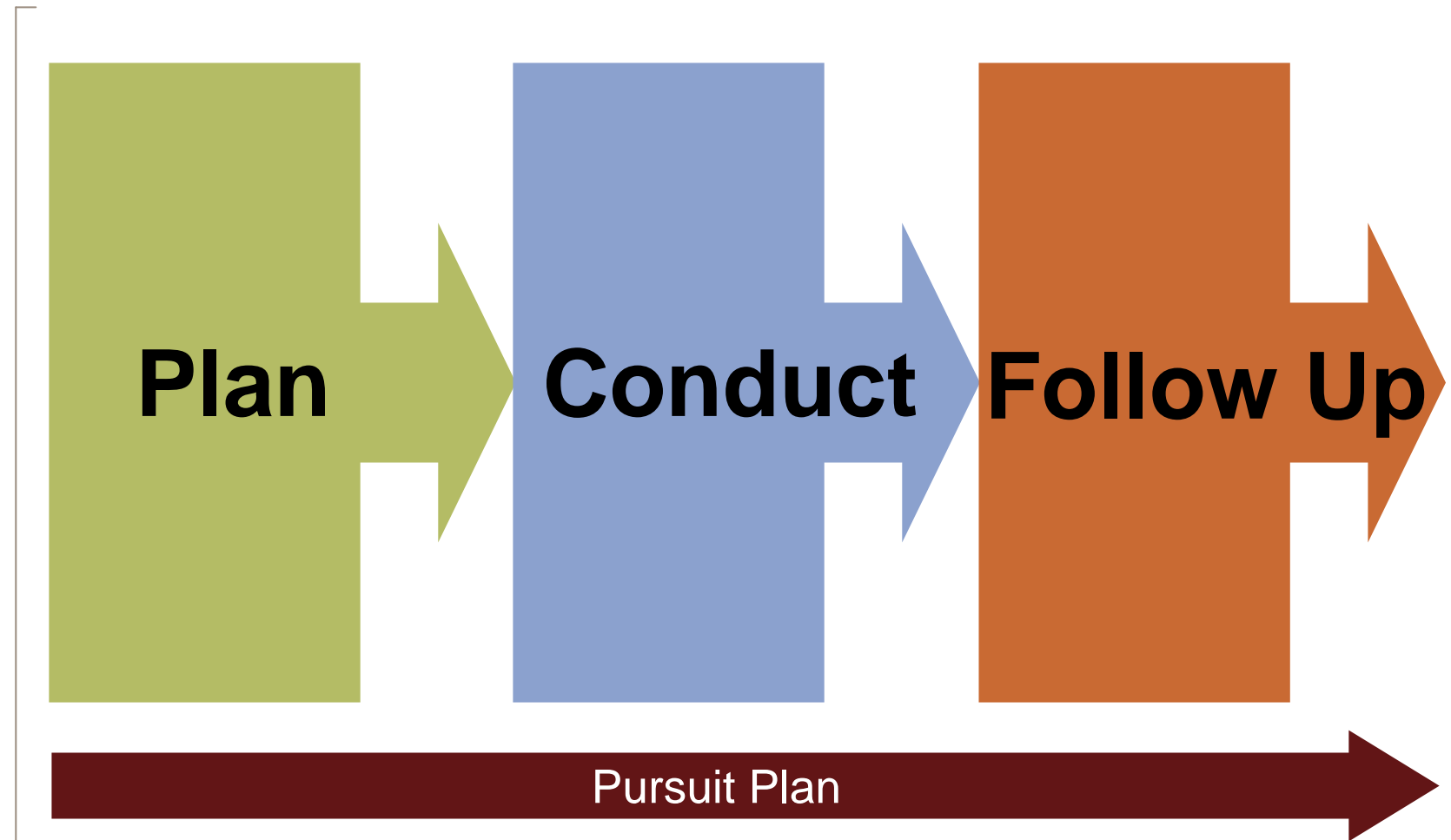
MOSS ADAMS<sub>LLP</sub>



# III Sales: Important, not urgent



# III Selling made simple



○ The days of “one and done” are gone.

# III The 5 questions

1. What actions have you taken in the past 30 days?
2. What actions will you take in the next 30 days?
3. Does your strategy still work?
4. What have you learned about the pursuit?
5. What do you need from management?

# III Why use a pursuit plan?

- A pursuit plan helps you
  - Plan how to develop a relationship into a client or sell a value-added service opportunity with an existing client
  - Avoid “one and done”
  - Develop substantive, actionable information
  - Understand dependencies
  - Plan and execute meaningful actions based on your knowledge of the pursuit or client

# III The pursuit plan form

Pursuit Planning Form		
Client/Target:		Lead:
Status:		Prepared By:
		Date:
KEY RELATIONSHIPS (NAME/TITLE)	CLIENT OPERATING ENVIRONMENT	
Existing:		
Needed:	CLIENT BUSINESS IMPERATIVES	CLIENT NEEDS
	Growth:	Routine:
MOSS ADAMS TEAM (NAME/ROLE)	Efficiency:	Explicit:
MOSS ADAMS GOALS	Risk/Other:	Unmet/Latent:
BARRIERS TO ENTRY/SUCCESS	MOSS ADAMS STRATEGY	ACTIONS IN NEXT 30 DAYS
PROGRESS SUMMARY		NEED FROM MANAGEMENT

## III Relationships

- You must be working with the decision-makers
- Who do you know?
- Who do you *need* to know?
  - Ask “How will this decision be made?”
- Don’t limit yourself to
  - Existing contacts
  - Company contacts
- Use your network

# III The relationship map

- Helps lay out who you know and who you need to know
- Helps others see how they can help you network to get introductions to the right people

Legend for Type of Contact: Executives (Ex.); Operations (Ops); Board of Directors (BOD), Surround Contact (SC)

Legend for Decision Making: Authority (Auth); Influencer (Inf.); Non-factor (NF)

Legend for Status: Advocate (Adv.); Supporter (Sup.); Neutral (Neu.); Negative (Neg.)

Legend for Priority: 1, 2, 3

Prepared by:

Client:

Lead:

Date:

## RELATIONSHIP MAP

Type of Contact	First Name	Last Name	Title	Decision Making	Status	Communication Style	MA Contacts	Priority (1, 2, 3)	Current Vote	Last Touch	Next Touch	Notes

# III Business operating environment

- Understanding will help you
  - Ask better questions
  - Differentiate yourself
  - Earn the right to solve a problem
- Industry
  - Issues and trends
- Operations
  - Entity structure
  - Number of employees
  - Locations

## III Business operating environment cont.

- Recent events
- Customers
- Service expectations
  - Communications (frequency, style, substance)

# III Business operating environment cont.

- Finances
  - Revenues
  - Pre-tax earnings/effective tax rate
  - Receivables/payables
  - Inventory and methodology?
  - Assets
- Purpose of their business
  - Description of the business
  - What drives “the machine”
  - Vision and values
- Benchmarking

# III Imperatives for success

- How will they grow?
  - Top-line initiatives
  - How are they accomplishing growth?
- How will they become more efficient?
  - Bottom-line initiatives
  - Help them identify opportunities to increase efficiency
- What unique risks or other issues do they face?
  - Each business is unique
  - Question and listen to derive information

# III Needs from imperatives

- Routine needs
  - Is it really routine? Ask questions
  - Routine does not mean compliance nor commodity
- Explicit needs
  - You do not need to create awareness; they are already aware they must do something
- Unmet/latent needs
  - This is where we will distinguish ourselves
  - Become a trusted advisor

## III Our team—who will do what?

- Identify the right internal team members
- What role will they play?
- Why is this important?

## III The goal

- Get the team on the same page or you risk the client's faith in your professionalism
- Goals should be progressive
  - Entry point towards ultimate service goal
- This is a marathon

## III Barriers to achieving the goal

- Competition
- Staff capacity
- Service misalignment
- Client understanding of their needs
- Your perception of client needs
- Apathy
- Pricing
- Others?

## III Side point: pricing

$$\text{Value} = \frac{\text{Quality + Price of Product}}{\text{How Product is Delivered}}$$

## III Our strategy

- The unifying doctrine such that our actions make sense and are aligned
- How we will accomplish our goals in light of our barriers
- Strategy must be flexible

## III Our actions

- What will we take/do in the next 30 days?
- Actions make our strategy real
- Actions should be focused on relationships in light of what we know about the company
  - The business' operations
  - The imperatives and needs
  - 75% of activity should be focused on the people with whom we have or want a relationship

# III Progress

- Where is your pursuit in the sales process?
  - Identified
  - Qualified
  - Pursuit
  - Proposed
  - Won/lost
- Actions taken thus far
- What do you need from management?

# Questions?

Thank you!

MOSS ADAMS LLP

