SwaggerSales™

Supercharge your Performance

WINNING BEFORE THE CALL

THE ART OF DEPLOYING EFFECTIVE PRE-CALL PLANNING FOR YOUR ENTERPRISE SALES TEAM

www.swaggersales.com

INTRODUCTION

> *In complex B2B sales, a single well executed meeting can dramatically propel a deal forward; a bad one can kill it stone dead.*

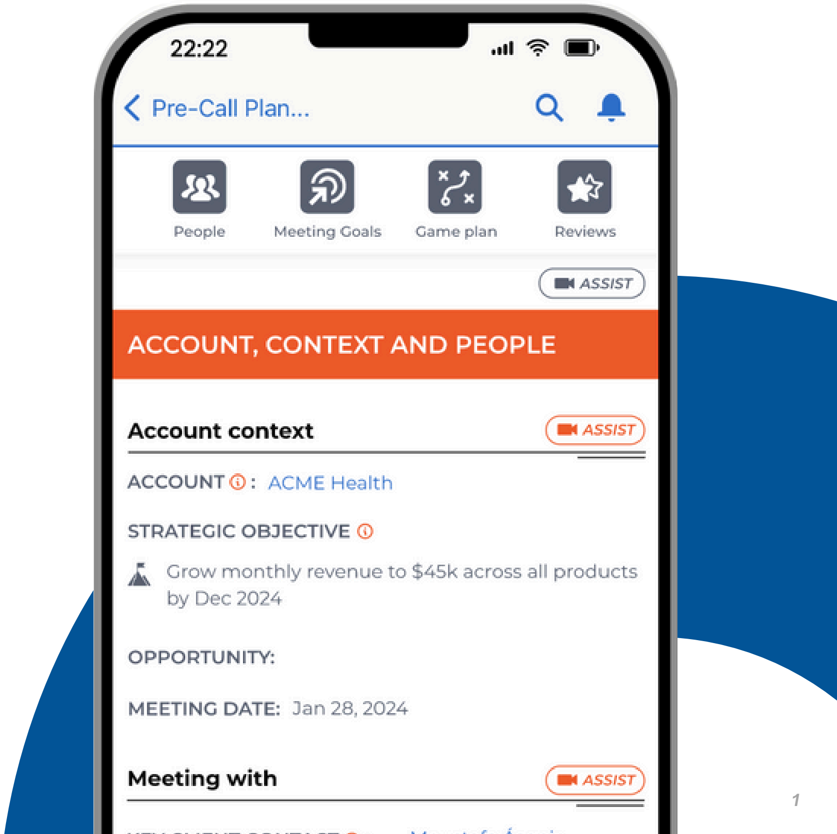
Yet most VP Sales, overflowing with pipeline analytics, have almost no visibility to the quality of their team's front-line call planning and execution that ultimately drives that pipeline.

Experienced sales leaders understand the value of pre-call planning, but many have suffered from "failure to launch" with previous implementations. They often tell us "Call planning is great when it's used, but it's patchy". They've seen little embrace from the front-line team, and therefore limited value for sales leadership. And – most importantly - it hasn't moved the needle on productivity.

But when deployed well, CROs and Sales VPs routinely see ***productivity gains of 15% and more*** from robust pre-call planning, simply because the team approaches every big meeting with intent and a gameplan, and therefore wastes a lot less meetings. Side benefits include greater discipline, better "osmosis" learning of best practices across a team, and the ability to see problem areas early, even in the largest field sales teams.

Let's dive in.

IN THIS WHITE PAPER



WHY DEPLOY PRE-CALL PLANNING?

The primary benefit of pre-call planning is obvious – sales rep productivity. Customer meetings are precious – yet in our experience serving B2B sales organizations dealing in complex sales, as many as 45% of customer meetings fail to achieve their intended outcome.

Equipping your team with a simple, effective "pre-flight checklist" drives almost instant pipeline acceleration. Even the simple act of writing down a specific meeting objective, (what we call an "Advance"), will dramatically increase the chance of a salesperson achieving this outcome.

But pre-call planning delivers a number of less obvious but important benefits:

- **Faster team alignment for the biggest meetings.** For customer meetings where more than one person from your commercial team attends, (such as a rep and their manager, or a rep with a specialist), a consistent pre-call planning structure makes alignment easier and faster.

- **Evidence-based front-line manager coaching.** In B2B sales teams, front-line managers will typically only spend around 3% of their time observing each rep in front of a client or prospect. When front-line managers review call plans, they not only help reps get more from their key meetings, they get a very efficient view into the rep's mindset and approach, and can spot and coach problem areas early.

- **A step-change in manager field travel effectiveness.** Many front-line managers struggle to get past the "super-salesperson" role. During field travel, they often "co-sell" with the rep, missing the insights into competency gaps that are critical to coaching performance improvement. By requiring call plans for each meeting, the debrief process can start with "what was our meeting goal", "did we get it", and "why do you think that was" – leading to a dramatically more productive coaching conversation.

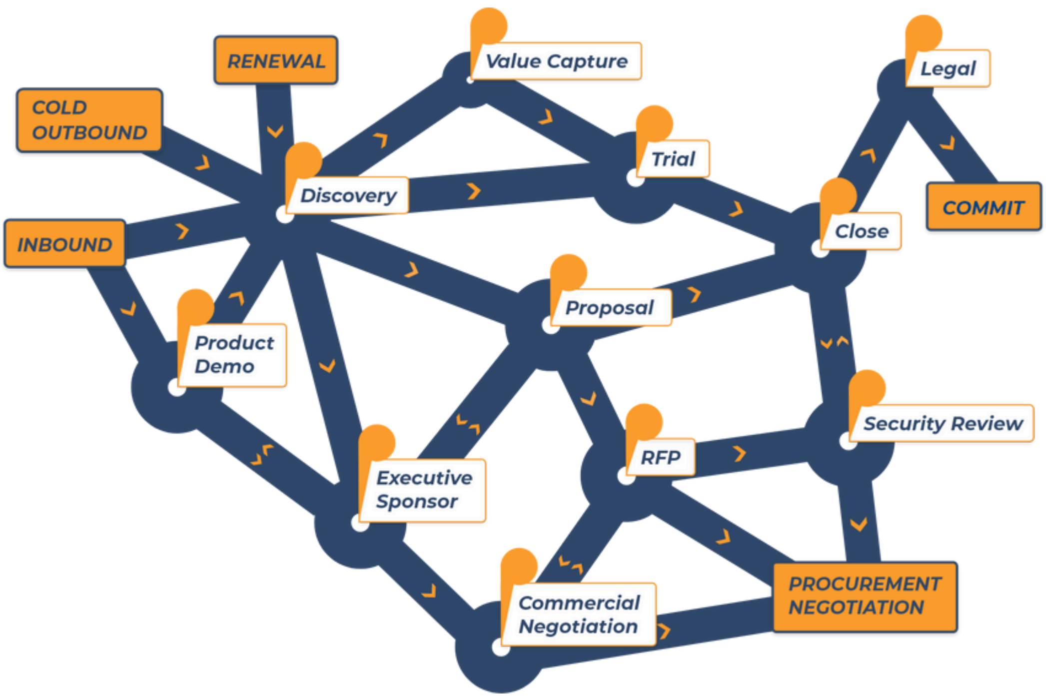
- **Leadership visibility to the front line.** As the old saying goes – "People respect what you inspect". If you implement a good pre-call planning solution inside your CRM, you can hold not only reps but front-line managers accountable and drive discipline across the team. It also opens up important opportunities to learn from your team's wins and losses. For example, when debriefing CLOSED-WON and CLOSE-LOST deals, you can look at ("what was the rep talking about in the lead up to this result" and "what can we do better next time"). When a large deal is at risk or slipping, the deal review process can move beyond "when is it closing?" to "what's our next step to fix it?".

WHAT TYPE OF SALES TEAMS BENEFIT MOST FROM PRE-CALL PLANNING?

Field sales teams involved in complex B2B sales are the prime target for pre-call planning. This is usually your mid-market, enterprise and key accounts teams who manage the larger deals involving multiple stakeholders and longer sales cycles. Decision-makers and influencers in these accounts tend not to have predictable “care abouts” (technical, organizational and personal), and the sales process does not tend to proceed “linearly”. This makes “playbook” strategies almost impossible, and bespoke call planning incredibly useful.

WHAT WE IMAGINE COMPLEX SALES LOOK LIKE

WHAT COMPLEX SALES ACTUALLY LOOK LIKE



As a rule of thumb, if your salespeople are managing (on average) deals with 3 or more stakeholders, contract value of $50k or more, that take more than 7 meetings to close, it is likely that implementing pre-call planning will be highly beneficial. If they engage the VPs or C-Suite in your customer accounts to close deals and sell deals with an average total deal size over a million dollars, robust call planning is essential.

SMB sales (low contract value, high volume, typically fully remote) lend themselves much more to "playbooks" where, depending on the stage of the sale, customer meetings, agendas, "advances", and game plans are much more predictable and can be predictably "gamed out". For these reps, a good playbook coupled with conversational analytics tools like Gong can be a more effective productivity tool because, unlike enterprise, you can predict each step and "Advance" in the sales process.

WHAT A GOOD CALL PLAN LOOKS LIKE

We've seen many sales organizations roll their own pre-call plan, either on paper/PDF, or into their CRM, and come up short.

The most important components of the call plan itself are not complex:

- A clear meeting goal (the “Advance”)
- A view of what the person we are meeting cares about, and their likely pain points.
- A “game plan” for the meeting (questions, information to disclose, how we open, likely objections and, if more than one person from your organization is attending, the roles each person has)

Avoid cluttering your call plan template with anything that isn’t high value for the rep and their manager. I’ve seen all sorts of superfluous fields added to call plans - the meeting duration (who cares?), whether it was in person or remote (it really shouldn’t matter), check boxes to mark which products you are there to talk about (totally counterproductive to solution selling - the conversation should be framed about the customer and their pain points, not your products), and what marketing collateral the rep is bringing (no matter how much your head of marketing asks, never, ever add this to a call plan template).

Distill to the essentials only. If it doesn’t add value for the rep, their manager or their Director/VP, drop it.

But even more important than the content of the call plan is the workflow that it creates in your sales team. A well-designed call plan that a rep uses in isolation that goes nowhere is still valuable. But if that same call plan can be shared with others, if I can get feedback from my manager prior to the call, if I can debrief the big calls after the fact, and if I can see previous call plans for this account from my meetings and those of others working the account, then this becomes a learning tool for your whole organization.

This is why CRM integration is so important. See below.

GAINING BUY-IN FROM YOUR FIELD SALES TEAM

Perhaps the single biggest challenge for sales leaders is to launch the call plan in a way that gives your field team immediate value and gains their buy-in.

Again, most companies get this wrong. They’ll run a boring internal 1-hour Teams or Zoom call to walk the sales team through what the call plan fields are and expectations of when they need to do a call plan. This is the simplest way to ensure that your deployment lands with a thud. The reps will view call planning as administrative, not value add.

Call plans are there to make reps, and the team, more successful.

Buy-in from your team comes not from showing them the tool, but from showing them how this tool will make them more money.

When we launch pre-call planning for our clients' sales teams, we run a couple of live, hyper-realistic customer meeting simulations:

- First, they take the meeting with "as-is" (planning however they normally would), and
- Only then do we talk them through a very well-designed call plan, covering more advanced topics like leverage, and we run a do-over.

We film these meetings, and our expert consultants play back the mistakes. The sales team's jaws drop when they see what a difference a simple call plan makes. There's half of your buy-in.

The remaining buy-in comes from their early use, and their success with, using it in the field on live opportunities. Get them to plan for an important upcoming call as soon as possible (ideally during the launch training). Manager reviews early are also important – see below.

Last thing – when you launch, clearly convey expectations to the team about when a call plan should be completed. Never use pre-call plans exclusively as a leadership measure of activity. See guidelines and common mistakes below.

Consider getting an expert in to help. There's nothing more expensive than a new sales initiative that doesn't gain traction.

CONTACT US

COACHING USING PRE-CALL PLANS

> ***Great front-line managers coach people, not just deals. Higher sales productivity for a team comes primarily and most easily from identifying and fixing capability gaps in your mid-performers.***

Front-line managers who understand these two subtle, but critical insights can scale their team's capability, instead of acting like "the ninth rep on the team".

Coaching *people* requires that managers identify capability gaps that are holding each rep on their team back from higher performance. Field travel is one way to do this, and highly valuable when done well.

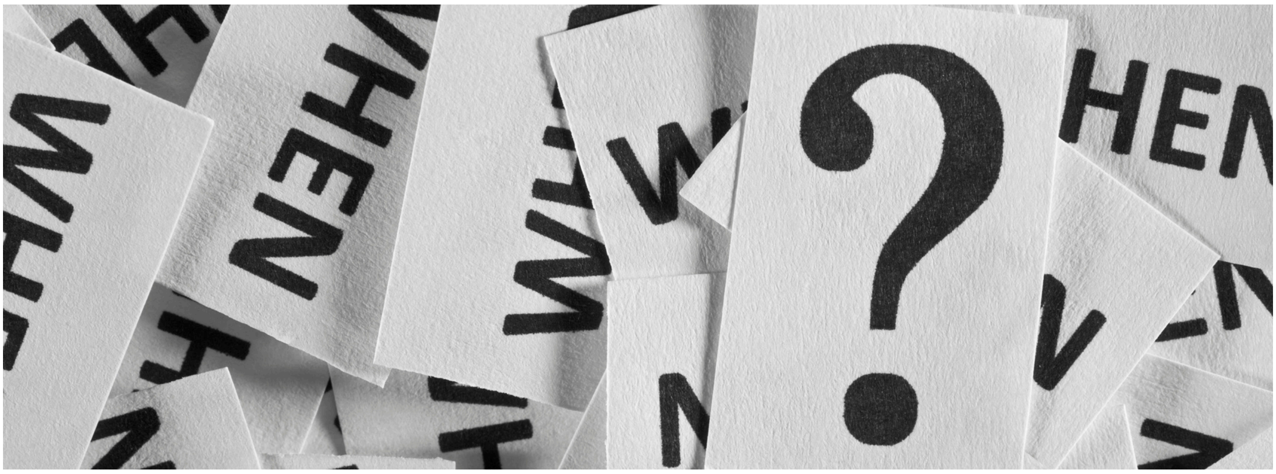
But even without manager field travel, reviewing an Account Executive's pre-call plans for their biggest meetings will tell you a lot about their capabilities:

- Their mindset and confidence,
- How high they are engaging into their target accounts (users, managers, executives),
- Their sales style - are they solving client pain points, or talking about their products?
- How well do they understand organizational and *personal* motivators of people they are meeting?
- Are they monetizing client value (putting a dollar figure on client pain points) to avoid commoditization, or just talking generic value and benefits?

Post-meeting, even if the manager did not attend the meeting, with a good call plan and a few great coaching questions you'll learn a lot about the rep's ability to *execute* on their plans. (*What was the meeting goal? Did we achieve it? If not, why do you think that was? What's the basis for that? What else could we have achieved in that meeting? What would you do differently next time? What do you think our next best step is?*)

WHEN YOU SHOULD EXPECT YOUR TEAM TO BUILD A CALL PLAN

You do not need your team to create a call plan for each customer meeting. (In fact, doing so is hugely counter-productive, see "Biggest mistakes" below).



As a general rule, call plans will add value in these circumstances:

- **For large meetings** with multiple people from your team attending. Have one person (preferably the account or opportunity owner, *not* the most senior person) create a call plan first then get feedback and alignment from the rest of those attending tends to be far more efficient than a "group discussion".

- **For critical meetings** (either in the C-Suite - where you rarely get a second shot - or for meetings involving large or must-win deals). If a badly executed meeting would really hurt (or affect your quarter), a call plan usually represents time well spent.

- **For front-line manager field travel.** Smart managers will *insist* on call plans so both the rep and manager get the most out of this precious coaching time. A clear meeting goal and gameplan makes a post-meeting debrief and coaching conversation objective, not subjective.

- **For onboarding new hires.** New hires, (even those with significant experience) can be ramped up faster if you have better visibility to their client-facing execution in the first few months, as their managers can spot problem areas early and course-correct.

- **For new product launches**, where sales and marketing leaders need to get early feedback from the field on what the team are talking about with clients, and what's working / what's not.

ESTABLISHING CADENCES AND EXPECTATIONS

When it comes to call planning and coaching, one size does not fit all.

A manager's leadership style and expectations for a top performing rep should be dramatically different to what they use for the mid-performers and new hires. The first task is to segment the team based on capabilities.

In general, the leadership style can then be put into three buckets:

Cadences for call planning should follow a similar segmentation.

New hires will tend to do a lot of call planning so managers can course-correct early.

At the other end of the competency scale, Account Executive "superstars" (your President's Club regulars) may only require only occasional call plans – usually for team alignment on big meetings, but also to support others on the team learning from the best.

It's the "mid-pack" performers where call plans really can add enormous value in spotting and coaching capability gaps. This is where most B2B sales teams in complex sales find the "lowest hanging fruit" when it comes to overall productivity growth.

MANAGING YOUR MANAGERS

VPs managing a team of front-line managers can substantially increase their managers' performance with a few minor changes in behavior:

- A VP's regular check-in on a manager should focus on both ***pipeline*** (where most inexperienced VPs focus exclusively) and ***people*** ("*Tell me about the strengths and weaknesses of your team? Why is this rep outperforming that one? What's the single biggest skill that this rep needs to accelerate? What's your leadership approach for that rep?"*) If you express interest in the capabilities of the manager's team members, so will the manager.

- Deal win-loss debriefs with a manager should also invest time in reviewing the salesperson who ran the deal. By moving beyond *pipeline* and talking *people*, you are forcing an analysis of "selling muscle" and the gaps that might prevent the next deal going the wrong way.

- Deal rooms – weekly or monthly meetings where a team (often multi-level - reps, managers and a VP) reviews live opportunities together – can move beyond forecasting ("*When is this closing?* What's holding it up?") to a review strategy and next steps ("*What's our approach from here? How will we create urgency? What's our immediate next step?*"). These meetings are far more powerful and robust when the reps whose deals are being reviewed turn up to these deal rooms with a call plan for the next step ready.

With the SWIFT™ app (see below), leaders can drill down to see strengths and weaknesses of each front line manager's team and spot selling and coaching problems early.

CRM AND DATA INTEGRATION

If your team is pre-call planning on paper, you're losing 75% of the value of creating the process.

> ***Call plans create highly valuable data for a sales organization. If that data is sitting in PDF files on your sales team's laptops (or scribbled on napkins), it's not really your data.***

If it's not in your CRM, it's not accessible to others in the organization, you can't run any data analytics on it, and when a rep leaves the company, the history of engagements with that rep's clients tends to walk out the door with the rep. High risk.

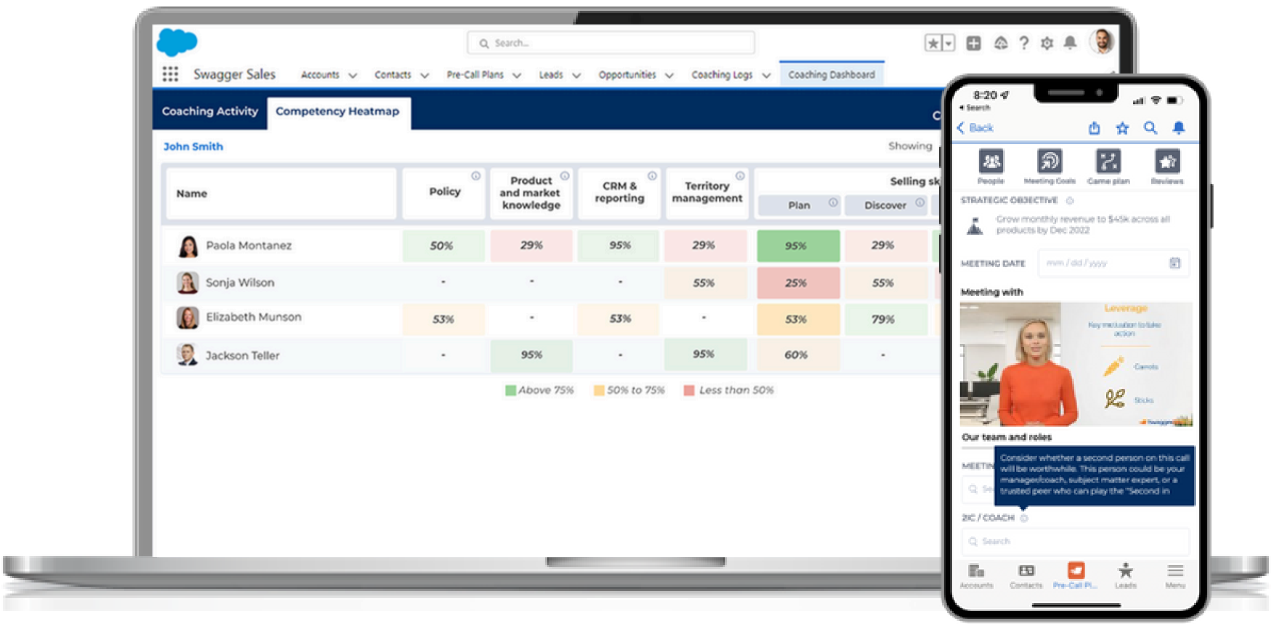
It's important that your call plans form part of your CRM data, which should be your "single source of truth". But there are a couple of other considerations.

First, rolling your own call plan (for example, asking your CRM admin team to add some fields to an Opportunity), rarely works out well. Designing a call plan that really *changes behavior* is not easy. A great call plan template will challenge the rep's thinking (on leverage, on optimistic meeting goals, on how to open the meeting), not just force them to fill in stuff that they would anyway.

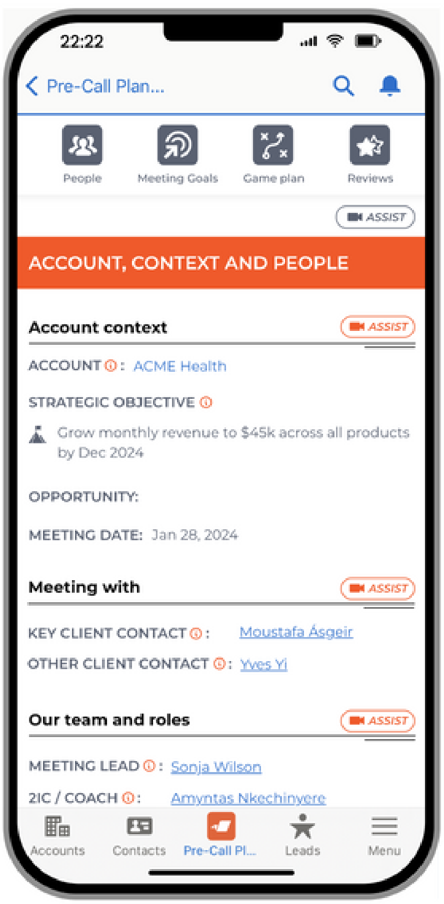
Second, pre-call planning is much more than a form attached to your CRM. When designed well, it creates a simple, powerful **workflow** between your reps and their managers.

SWIFT™ CRM-INTEGRATED CALL PLANNING

SWIFT™ is our Salesforce-native app that embeds powerful sales enablement tools directly into your CRM and sales processes. Its modular, "plug-and-play" design allows you to select the functions your team needs most. Features include pre-call planning to enhance key customer meetings, negotiation preparation to reduce discounting, strategic account planning to identify risks and revenue opportunities, and manager coaching to transform front-line managers into effective team coaches for sustainable sales growth.



DRIVING FIELD EXECUTION AND PERFORMANCE



When we designed the *SWIFT™* app, we realized it needed to support a range of "use cases" that a high performing field sales team needs:

Sales Reps:

- An individual rep builds a call plan for themselves to ensure they've covered the bases prior to a critical meeting,
- A rep aligns multiple people attending an important meeting, or who also work the same account,
- A rep wants a follow-up process and reminders so they don't let actions slip between the cracks,

Front-line Managers:

- A manager wants to review call plans prior to a day in the field with a rep, and debrief afterwards for coaching,
- A manager wants to assess a rep's call planning and understand competency gaps (without attending the customer meetings),
- A manager wants to share a great example of a call plan with the rest of the team so they can learn from each other,

Sales Leaders:

- A sales operations leader wants to understand how often each rep successfully executes their most important meetings,
- A sales leader wants to see which reps are building great call plans, and which managers are coaching and stretching the capability of their teams for accountability and discipline.

LEVERAGING AI IN PRE-CALL PLANNING

Artificial intelligence and Large Language Models (LLMs) are obviously a very fast-moving field. It's impossible to predict what the world will look like in 3-4 years, but at the time of writing (October 2024), here's where we see it:

- AI agents and chatbots will, (and in many cases already do) excel in repetitive sales tasks (high volume, low variability). This makes them a good fit for SMB sales, SDRs and service tracking (tickets, status updates etc.) where the sales or service cycle is highly predictable.

- For complex sales and enterprise, AI will quickly streamline the research phase going into critical meetings, summarizing previous interactions and distilling large amounts of CRM data into useful nuggets. However, this is information, not strategy. With buying decisions involving multiple stakeholders and routinely being driven by individual decision-makers' personal motivations, relationships, credibility, and trust, we see bespoke call planning for enterprises continuing.

- Having said that, AI requires good data structure as its source, and companies that have incorporated pre-call planning into their CRM will have substantial advantages. We have clients who deployed our *SWIFT™* tools 3 years ago (300 field sales people) who now have tens of thousands of call plans, manager feedback and coaching notes on which to draw as the data analytics advances.

Smart sales operations and enablement leaders will implement pre-call planning inside their CRMs so they can start to build the LLM and AI Agent data they'll need in the next few years.

MOST COMMON MISTAKES

Using pre-call plans exclusively as a measure of sales "activity". Activity is important, but when it comes to call planning, sales leaders need to be looking at quality, not just quantity. We've seen sales VPs ruin an otherwise solid call planning deployment by burdening their whole sales team with the same expectations of "10 call plans per week". This forces them to create call plans for meetings that do not require one. Call planning is about performance, not administration. Reps should be creating call plans for meetings where the call plan is likely to make them more money.

Forcing "one size fits all". Experienced, high performing reps will tend to use (and need) call planning less often than mid-performing reps who have significant room for productivity growth. Enterprise and mid-market teams have different needs. Forcing managers to treat all reps on their team the same way risks annoying the reps you need the most – the high performers. Smart leaders will segment their team and set expectations accordingly.

Over-stuffing your pre-call plan format. Just because your marketing team wants to know which of their brochures and sales tools are being used in the field does not mean you should add a field to your pre-call plan to track it. Fiercely distill your call plans to only the information that will add value to the rep, their manager, and their sales leaders.

Launching without some skills training. Gaining strong initial buy-in from your reps and managers is critical to embedding this as part of your way of doing business. A boring 1-hour presentation from marketing or sales ops talking through the fields in a pre-call plan will not achieve this for experienced salespeople. We've found that some form of quality simulation-based skills training will deliver the "A-Ha" moments that you need for buy-in.

Implementing call planning outside of your CRM. Your CRM is meant to be your "single source of truth" for customer data; why would you want one of the most important parts of that data (your team's client-facing planning) to be scribbled on napkins?

LOOKING FOR A SHORT CUT TO LIFTING YOUR TEAM'S PRODUCTIVITY?

Swagger Sales specializes in building client-facing (execution) skills for field sales teams in complex sales. We provide:

- Intensive skills training for even your most experienced salespeople – advanced pre-call planning, leverage-based value selling, negotiation and coaching.
- *SWIFT™* Salesforce native plug-in software – creates fast, effective pre-call planning and coaching workflows with your field sales team. (Also includes optional account management and negotiation preparation modules)
- *Expert advice on deployment and sustainment*.

If you are interested in boosting your sales team's productivity by 15-25% with the Swagger Sales curriculum and the SWIFT™ App, please get in touch! We look forward to speaking with you.

BOOK A DEMO

