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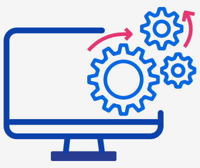
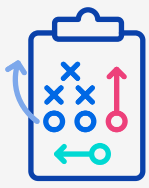
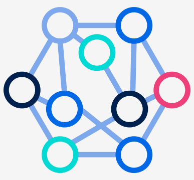
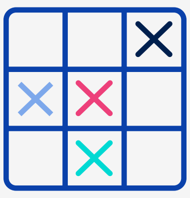
5 Key Capabilities for More Effective Sales Planning

Annual planning is a key exercise for every enterprise sales team. Yet, many plans are hampered by low-quality data and inadequate insights into accounts and opportunities. The results? Inequitable sales territories, scrapped account plans, and overutilized resources.

Tap into the following five capabilities for data-driven, actionable plans that yield a healthier pipeline and better sales outcomes.

Capability	Why You Need It	How It Helps
1 Automated sales activity capture 	**Many CRMs can't be trusted.** Incomplete data is a seller's worst nightmare – 47% of enterprises feel they can't rely on their CRM to provide a single source of truth regarding customers. Moreover, 78% agree or strongly agree that a gap in data management is the main reason they can't take full advantage of their data.[1]	Fuel your CRM with more accurate, complete, and up-to-date details on every account, contact, and opportunity by automatically capturing and syncing business-relevant data from reps' inboxes, calendar entries, and more. Analyzing prior sales activity in every account using AI can surface the insights teams need to form data-driven account plans and better territory designs.
2 CRM-native account scorecards 	**Account plans executed outside the CRM can't be measured or reinforced.** As a result, 56.5% of sales organizations don't take advantage of account planning to grow their strategic accounts.[2]	Using customized scorecards makes it easier to assess overall customer and prospect health. Identifying high-value accounts with high-growth potential – as well as at-risk accounts who need more engagement – provides sales leaders and managers with insights they need to coach reps and ensure account plans stay on track.
3 Relationship maps 	**Buying groups are more complex to navigate.** More than 60% of purchases involve at least 4 people in various roles and from multiple departments.[3]	Continuously visualize and track the buying group of priority accounts – even as people get promoted or leave. Help sellers understand the influence each buyer wields, map their connections to other advocates, and ensure your team is ready to engage the right people at the right time.
4 Whitespace maps 	**Help expand within accounts.** Sales teams are 48% more likely to grow their footprint within an account with effective planning. Easily pinpointing the most promising areas for cross-selling or upselling will only help.	Visualize the most effective route to expanded revenue. Whitespace maps make it easier to quantify the TAM across customers and market segments. Pinpoint new, cross-sell, and upsell opportunities within accounts that are prime candidates for your offerings, and understand competitive footprints to assess strengths and potential threats.
5 Activity trends and engagement dashboards 	**Overextending top performers leads to burnout.** Allocating sales resources to the wrong opportunities can lead to lower revenue and high attrition. Nearly 90% of sellers are experiencing burnout, and 54% are actively looking for a new job.[5]	Understand how much time your resources are spending on certain opportunities, and leverage engagement scores to understand the health of each deal. Getting a full picture of how teams spend their time can help reallocate resources to avoid burnout, while also keeping top performers focused on the deals that have the most revenue potential.

Get Ready to Prime Your Pipeline With More Effective Planning

Pave the way for an ideal, frictionless path to more pipeline and revenue generation. Get our workbook for more guidance, including how to assess your strengths and pinpoint areas for improvement.

Get the workbook

1 Forrester, "The State of Enterprise CRM Data Management," October 2021

2 LinkedIn, "Account Management Part 2: Why You Need A Formal Approach To Account Planning" Jan. 3, 2017

3 Forrester, "Three Seismic Shifts in Buying Behavior From Forrester's 2021 B2B Buying Study," April 14, 2021

4 Gartner, "Position Sales Teams to Grow Accounts, Not Just Retain Them," Dec. 21, 2018

5 Gartner, "How to Motivate and Retain Your Sales Team," Aug. 30, 2022