BAG | STANDARD FIELD GUIDE

STRATEGIC PLANNING WITH PURPOSE

Knowing what to do, how to do it & why it matters.

NAME

PERIOD

ONE · IDENTIFY A SINGLE SALES OBJECTIVE (SSO)

Pick one objective and let it organize everything else. State it plainly — drive or achieve X in the area you most want to improve.

THE SINGLE NUMBER I'M MOVING

AREA I MOST WANT TO IMPROVE

TWO · WORK THE SALES PROCESS

Control the process rather than react to it.

	MY MOVE THIS PERIOD
• Get ahead of the sale — the next step before it arrives	
• Leverage counterparts — borrow access and credibility	
• Be very good at this very complex sale	

THREE · KNOW WHAT'S IMPORTANT & WHY

Effort holds up under pressure when the goal carries meaning.

WHAT HITTING THIS ACTUALLY MEANS TO ME

HOW I KEEP THE WHY IN FRONT OF THE WORK

THE SSO PLANNING MATRIX

Each tactic gets a timing, a budget, and a clearly named result.

	TACTIC — WHAT GETS DONE	TIMING	BUDGET	DESIRED RESULT — FINANCIAL + NON-FINANCIAL
1				
2				
3				
4				
	TOTALS			

DOCUMENT, TRACK & REFLECT

If it isn't documented, it can't be measured. Then ask the honest questions.

DID WE IMPROVE?

WHAT DID WE DO WELL?

WHAT DO WE NEED TO WORK ON?

5 WHAT MUST BE TRUE? · 3 WHAT CAN WE DO? · 2 WHAT WE'LL EVALUATE

If we want improvement, we keep measurement. If we want credibility, we keep score.