



RESPOND → PLAN → RETURN STRONGER

Journey To Business Resiliency

PRESENTED BY

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RETURN STRONGER 

Where to Next?



Uncertainties



Path to Refocus: Analysis, Decisions and Projects, Execution

1. Tactical evaluation and planning

- Organizational Values Beliefs and Behaviors
- Analysis of External Environment
- Competitive Analysis
- Key Market Factors
- Ideal Attributes Scorecard
- SWOT Assessment

2. Decision-making Project definition

- Brainstorming Priorities
- Establishing Expectations for Key Priorities

3. Resource and responsibility assignments

Metrics and Accountability

- Allocation of Resources and Responsibilities
- Planning Review Meetings
- Plan Summary



Path to Refocus: Analysis, Decisions and Projects, Execution



Analyze the External Environment

Environmental Factor	Priority	Impact on business	How Changed? (Since Feb)
Economy			
Governmental Issues			
Regional Influences			

Account Base

- ☐ Vertical focus
- ☐ Company size
- ☐ Common pains
- ☐ Sales-cycle length
- ☐ Revenue potential
- ☐ KARE (Keep, Attain, Recapture, Expand)
- ☐ Competitive positions
- ☐ Commercial vs. public sector

Economy

- ☐ Market cycles
- ☐ Seasonal buying patterns
- ☐ Regional influences
- ☐ Growth
- ☐ Vertical impacts
- ☐ Governmental issues
- ☐ Environmental issues

Service Structure and Deployment

- ☐ Direct/remote
- ☐ Internal/outsourced
- ☐ Product/service-based
- ☐ Team-selling focus
- ☐ Alliance/channel partners
- ☐ Industry specialization
- ☐ Practice/specialty groups
- ☐ "Strategic" teaming

Market Patterns

- ☐ Demographics
- ☐ Buying access
- ☐ Brand image
- ☐ Ethical issues
- ☐ Cultural issues

Competition

- ☐ Footprint
- ☐ Customer view/acceptance
- ☐ Growth pattern
- ☐ Sales/marketing strategy
- ☐ Pricing model
- ☐ Distribution methods
- ☐ Territory value propositions

Affiliations/Alliances

- ☐ Industry/trade associations
- ☐ Local colleges and universities
- ☐ Locations of clients from elsewhere
- ☐ Current channel partners
- ☐ Current alliance partners
- ☐ Current prime/sub-partners
- ☐ Chambers of Commerce
- ☐ Company alumni/friends
- ☐ Other affiliations/alliances

Key Questions We Addressed

Account Base

KARE: Keep, Expand, Recapture, Acquire
Which will remain viable?
New Targets

Economy

Duration
Depth
Direct Impact

Competition

How Will They Respond?
Which New Competitors?

Affiliations/Alliances

Who are my fellow Travelers?
Who do I need to join?

Service Structure and Deployment

What New Requirements?
What will I need?

Market Patterns

What New Issues and Will Emerge?

Example: Analysis of the External Environment

Environmental Factor	Priority	Impact on business	How Changed? (Since Feb)
Economy			
Governmental Issues	2	Moderate	Remote working; no in-person training No in-person networking
Market Cycles: Recession	1	High- Likely Negative	<ul style="list-style-type: none"> - Two customers- 1 shut down; 1 retail demise - Construction may return to training viability (was too vibrant) - Medical non-viable for foreseeable future
Service Structure	2	Moderate- Positive	<ul style="list-style-type: none"> - New topic areas in strong demand <ul style="list-style-type: none"> - Organizational Excellence (analysis, plan, execute) - Remote Selling - Remote management - Crisis management - Social Media Selling
Service Structure	3	Moderate- Negative	<ul style="list-style-type: none"> - Hiring demand decreased, lowering demand for "Hiring Model" and Assessments

Internal Analysis

SWOT For Today & 12 Months+



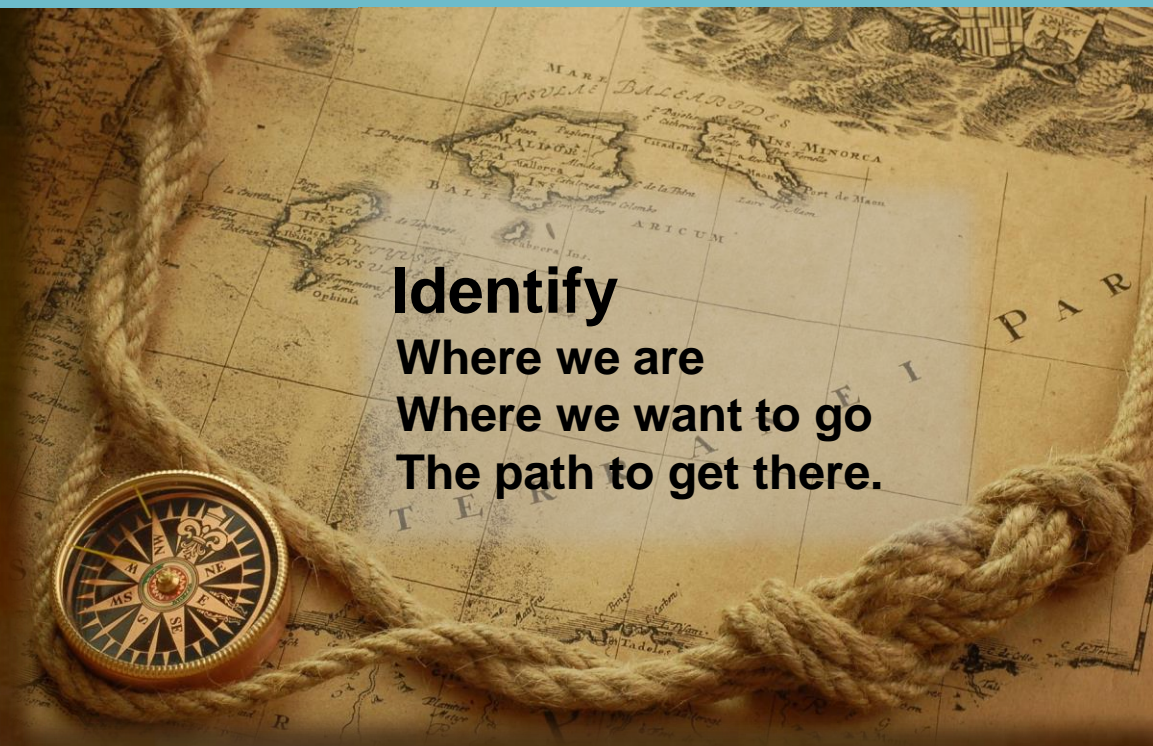
1. How do I limit negative effects within your control (weaknesses) and outside your control (threats)?
2. What can I do to leverage my strengths and capture my opportunities?
3. One action YOU can take today

Identify Priorities

**IF YOU CHASE TWO
RABBITS, YOU
WILL NOT CATCH
EITHER ONE.**

Proverb

[PICTUREQUOTES.COM](http://picturequotes.com)


A vintage map of the Mediterranean region, showing islands like Mallorca and Minorca, and the sea labeled 'MARE DALECARODIS'. A thick, light-colored rope is draped across the map, forming a large knot. A small, round, brass compass with a black face and white markings is placed on the map, partially covered by the rope. The background is a solid light blue.

Identify
Where we are
Where we want to go
The path to get there.

Identify Key Priorities

What will change when you have successfully addressed this priority?

How will you know when you have successfully addressed this priority?

LEADERSHIP TOOLS 
Tool 1.7.1

Establishing Expectations for Key Priorities

Key Priority #1: _____


Benchmarks:

Base Year:	Year 1:	Year 2:	Year 3:
Impact on Organization...	...if we do nothing?	...if we are successful?	

Identify Key Priorities

How do we know
we're on course?

What are our Metrics?

LEADERSHIP TOOLS 			
Establishing Expectations for Key Priorities			Tool 1.7.1
Benchmarks (Measurement)	Benchmark A	Benchmark B	Benchmark C
Quantitative Expectations	Base Year:	Base Year:	Base Year:
	Year 1:	Year 1:	Year 1:
	Year 2:	Year 2:	Year 2:
	Year 3:	Year 3:	Year 3:



Assessment: Where now?

- What are key priorities?

- Stay Afloat
- Generate Revenue
- Scale to New Demand
- Shift Market Positioning
- Continue Current Course
- Other

- What challenges to address?

- Cash Flow
- Current Team
- Work-at-Home Restrictions
- Organized, Systematic Plan
- Leadership
- Market swing – pending recession?
- Other



Execute & Change Management

LEADERSHIP TOOLS ✂

Allocation of Resources and Responsibilities

Tool 1.8-9.1

Action Items	Due Date	Assigned To	Cost	Time Frame When Funds Needed	Who Approves
1.					
2.					
3.					
4.					
5.					
R.A.C.I.	Who is Responsible?	Who is Accountable?	Who is Consulted?	Who is Informed?	

- How will this be communicated to the organization?

Questions

- Who's responsibility in the organization is it to drive the review process?
 - Owner
 - C-Suite
 - Sales Manager
 - Sales Team
 - Outside Resource
- Is the buck being passed?
- Do you need to outsource any part of this?

Test and Document

LEADERSHIP TOOLS X Planning Validation Survey Tool 1.10.3

1. Allow each meeting participant to complete this survey anonymously.
2. Ask participants to rate each statement on a scale of 1 to 10, with 1 being "disagree" and 10 being "agree".
3. Identify and discuss any areas where the average score is 9 or lower. This signals a need to closely review whether that aspect of the strategic plan is sound.

	Disagree			Somewhat Agree				Agree		
	1	2	3	4	5	6	7	8	9	10
The plan makes complete sense.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The plan is doable and nothing will prevent it from happening.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The plan can be accomplished in a timely manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other leaders (and the board) are supportive and committed to the plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
None of the SWOT items are insurmountable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All key issues can be overcome in an effective and timely manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All expectations are well within reach.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The plan lines up completely with my personal vision.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All external environmental factors that were identified can be overcome without too much effort or cause for concern.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When the plan is shared with them, all members of the team will be on board and there will be no push back.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A clear message has been created to share the plan with the team including clear vision, mission, and value statements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The plan is doable and nothing will prevent it from happening.

All key issues can be overcome in an effective and timely manner.

When the plan is shared with them, all members of the team will be on board and there will be no push back.

LEADERSHIP TOOLS X

The Plan Summary

Complete this form in the simplest terms possible! It is the starting point, and the agenda, of your review meeting.

Organizational Vision:	
Organizational Mission:	
Organizational Values and Beliefs:	
KEY PRIORITIES with quantitative measures, action items, and due dates/resources allocated; amount used, next time frame resources needed; and RACI:	Key Priority 1:
	Key Priority 2:
	Key Priority 3:
Gaps Identified and Possible Actions to Close Gaps:	

Managing Stakeholders Through Change

- Communicate
- Guide
- Support
- Principles of Change Management
 1. Know where you are today.
 2. Know where you want to be as a result of the change.
 3. Identify the why, what, and when elements of getting there.
 4. Involve the people affected by and integral to carrying out the change.
 5. Develop a plan.
 6. Monitor progress.



It Starts with a Commitment

- *“The only thing standing between you and your key priority is the bullshit story you keep telling yourself as to why it can’t be achieved.”*
- *“At the end of the day, let there be no **excuses**, no explanations, no regrets.”*



Thank You For Attending!

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Tools for your success

Business Assessment Survey

(please refer to Tool 0.3 in your Leadership Tools for blank worksheet)

LEADERSHIP TOOLS X		
Business Assessment Survey		Tool 0.3
Circle # of Points		The First P – PLANNING as a Perpetual Process
Yes	No	
①	0	17. Do you feel comfortable that you know who your major competitors will be three years from now?
②	0	18. At least annually, do you evaluate your market segments based on ideal attributes so each segment can be scored and ranked? (2 points)
①	0	19. Are you gaining market share in each market segment?
②	0	20. At least annually, do you evaluate your customers based on ideal attributes so each customer can be scored and ranked? (2 points)
1	①	21. At least annually, do you dig deeply enough to identify whether or not you have a true core competency?
2	①	22. At least annually, do you take a fresh look at identifying no more than three key issues that need to be addressed, regardless of whether those issues are short term/operational or longer term/strategic? (2 points)
2	①	23. Do you set quantitative, time-phased expectations/outcomes for each key issue that will enable you to determine when that issue has been successfully addressed? (2 points)
①	0	24. Do you create action items to address each key issue, assign specific people to each action item, and establish firm due dates for their completion?
①	0	25. Do you allocate the resources necessary to implement the plan?
②	0	26. Do you hold regularly scheduled meetings to review action items and due dates, and hold people responsible for attending all of those meetings and reporting progress on each item assigned to them? (2 points)

<https://www.mercury.sandler.com/OrganizationalExcellence>