

## Field Opportunity Review Target Account Selling™

The Field Opportunity Review (FOR) is critical to the successful implementation of Target Account Selling™ in a sales organization. To maximize utilization of Target Account Selling™ (TAS), and thus the value from an investment in implementing TAS, sales teams should participate in one or more FORs after participation in a Target Account Selling™ workshop.

The Field Opportunity Review is an intensive, highly interactive one-day workshop led by an experienced consultant that:

- Reinforces the concepts and application of Target Account Selling™.
- Uses the proven TAS Test and Improve Process to review and advance key sales opportunities.
- Provides coaching and feedback to both sales managers and sales teams on the application of Target Account Selling™.

By the end of the FOR workshop, participants will have:

- Reviewed the Target Account Selling™ methodology by applying TAS to their key sales opportunities.
- Improved the Opportunity Plan for key sales opportunities, including revised or new activities that enable the sales team to more effectively win the opportunity.
- Received coaching on how to apply TAS, including suggestions on areas of improvement.
- Practiced an opportunity review process that the team can use on a regular basis.

### Who Should Participate?

To foster teamwork and maximize the return on investment, sales teams should attend the FOR with their sales managers. This provides the sales team with an opportunity to apply the TAS methodology and review key sales opportunities, which not only reinforces TAS but also enhances collaboration in the field. Typical sales teams include sales reps, sales support professionals, and sales managers. Marketing, product management, sales professionals from complimentary organizations, including partners, could also attend.

### What Happens During the Workshop?

The FOR is an intensive day with the following agenda:

- Introduction by sales manager or executive.
- Overview of the Test & Improve Process by the OnTarget consultant and observations from his or her initial review of the Opportunity Plans.
- Four to six Opportunity Plans are reviewed, with feedback from the consultant after each to underline areas of strength in the use of TAS as well as areas for improvement.
- The OnTarget consultant concludes the session by summarizing strengths and areas of improvement in the teams application of TAS and suggests subsequent actions for the sales teams to better utilize TAS.

### What is the Test and Improve Process?

The Test and Improve Process is a formalized and structured opportunity review process designed to both advance a sales opportunity toward the close as well as provide an environment to reinforce and enhance the participants' knowledge of TAS.

Testing is first introduced to the sales teams in the TAS workshop. The Process is used on Day Three of the workshop.

Testing is also a key component of TAS, and provides sales managers with a standardized opportunity review process that can be used on a periodic basis to help the sales team:

- Win key sales opportunities.
- Forecast more accurately.
- More effectively deploy sales resources.
- Enhance sales competency.

Sales managers are taught how to conduct Test and Improve sessions during the Managing Target Account Selling™

Workshop (MTAS). The combination of the TAS workshop followed by an MTAS workshop for managers and FORs for the entire team has proven to be the most effective way to implement Target Account Selling™ as a standard business practice in a sales organization.

The initially Testing takes about two hours depending on the complexity of the opportunity being reviewed. As sales teams become more proficient in using the Test and Improve Process, reviews can be conducted in as little as fifteen minutes.

The agenda for the Test and Improve Process is:

1. The sales team summarizes the Plan.
2. The reviewers ask clarifying questions.
3. The reviewers then prepare their challenges to the Plan from three perspectives: the customer, the competition, and the company.

4. Reviewers present challenges to the sales team.

5. The sales team and reviewers address the challenges by revising the sales plan, including the next activities to win.

The outcomes of the Test and Improve Process are:

- A more realistic view of the sales opportunity,
- A common understanding of the opportunity, and
- Better activities to close the opportunity more effectively.



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