

## PLANNING (PCS)

Planning sessions or Prospect Case Studies (PCS) are a simple, team-oriented process to create strategies that help our prospects advance. Rather than attempting to “close” our prospects too soon or too often, which risks pushing them away, our goal is to help them “advance” through their stages of readiness. Small steps. One after another. Each advance increases the prospect’s readiness to buy.

## TEAM PLANNING MEETINGS

Team Planning Meetings are crucial to this process. There’s simply no substitute for the inquisitive, creative brainstorming that a team provides. A best practice is to hold team planning meetings each morning. This routine allows you to develop a deep understanding of your prospects, coordinate your sales activities, and ensure that your “time in the selling zone” is effective.

### Why We Plan?

- What value does Planning bring to the sales process?
- What is the measurable outcome of Planning?

### When We Plan?

- What time of the day is most effective to plan?
- How is Planning different from a Department Head Standup?
- How frequently do you plan throughout the week?

### Who Participates in Planning?

- Are internal and external Sales Team members involved?
- Are Executive Directors or other Operations team members involved?
- Are Company leadership involved?
- Who should be involved in Planning and why?

### Who We Plan For?

- We have found the following to be good opportunities for Planning:
  - Pending Move-ins
  - Today’s face to face
  - Top Ten prospects
  - Recent advances
- How do you select which prospects to plan for?
- How many prospects do plan for in each session?

### How To Plan?

- For each prospect consider the following:
  - What do we know about the prospect? What is their stage of readiness?
  - What do we want to know about the prospect? List questions.
  - What have we done so far with the prospect? Review sales history.
  - What is our strategy to help them advance? Plan a next step.
  - Do we know enough to create personalized creative follow up that might motivate them to call us?