

the  
benefits trust



## Building a Bulletproof Sales Plan The Benefits Trust

AN EFFECTIVE SALES PLAN REQUIRES SMART GOALS,  
ACCOUNTABILITY, AND A COMPELLING VALUE STATEMENT.

GET EXPERT GUIDANCE FROM THE BENEFITS TRUST NOW!



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# THE IMPORTANCE OF BUILDING A BULLETPROOF SALES PLAN

We've said it before, and we'll say it again: a benefits plan is nothing more than a ***promise between an employer and their employees.***

With that in mind, crafting an effective benefits plan for your clients and prospects is all about understanding where they're headed and building ***a plan based on those needs.*** To achieve this, asking future-based questions is critical to gauge client direction and aspirations. Then, leverage that knowledge to build an effective, customized plan solution.

This is all well and good for sales meetings, but how do you, as an employee benefits provider, build an overarching sales plan? Working in sales can be extremely rewarding, but it can also feel isolating.

We're here to help support you and provide you with the information, tools, and resources you need to navigate employee benefits sales like a pro. So, let's get into how to ***build your bulletproof sales plans*** that satisfy both your clients and your own personal and professional goals.



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# Creating an Effective Sales Plan

Smart goals are SMART goals: **Specific, Measurable, Attainable, Relevant, and Time-bound**. Approaching your sales plan through this lens will simplify your goals and set you up for success.

Goal setting can initially feel somewhat abstract, but these elements will help provide clarity. Together, we'll explore the aspects of building a bulletproof sales plan one by one, beginning with accountability.

## ACCOUNTABILITY AND SUPPORT

***First thing first*** – hold yourself accountable.

We recommend assembling a board of advisors to help keep you accountable and provide group support. If you have a literal board of advisors, that's excellent, but if not, you can create your own.

Ask your spouse, friends, employees, mentors, or anyone else you trust to keep you accountable. Establish ***regular check-ins*** where they ask questions about your goals and progress. For instance, if one of your goals is to have ten sales meetings each week, you can direct your advisors to ask whether you're meeting that target.



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## TARGET MARKET IDENTIFICATION

An essential aspect of a bulletproof sales plan is identifying your target market. You can define your target market based on all sorts of factors: ***size of the business, years in operation, geographic location, industry, demographics, preferred communication mediums, or anything else that's relevant.***

For instance, maybe you only want to work with startup businesses, or perhaps you value clients that interact face-to-face. Whomever your target market is, try to spend at least 80% of your time in that group.

Become an expert in your target market and ensure you can communicate that expertise to your prospects effectively.

## VALUE STATEMENT

To sell effectively, you must know what you're going to say. Craft a value statement that clearly outlines how you can help your prospect and the value you can add. Make sure it's a qualifying statement, and ensure it rolls off the tongue – **you want to be able to say it in five seconds or less.**

At The Benefits Trust, we say: “We help successful business owners build a better benefits plan than they can get anywhere else.” Each section serves a purpose when you analyze that statement inch by inch. The statement is brief, informative, enticing, and engaging. Crafting this statement is challenging for any advisor, but you'd be surprised how a simple five-second statement can transform your results.



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## SALES STRATEGY DEVELOPMENT

Now, let's get into the numbers.

Begin by defining your revenue goals; let's say you want to take home \$100k in annual revenue. **Determine your case count goals** as well as your closing ratios.

With this information, you can reverse-engineer to pinpoint precisely how many prospecting calls and sales meetings you need to reach that annual revenue goal. You can then further break it into actionable steps, creating quarterly, monthly, weekly, and daily tasks to get you where you're going.

We at *The Benefits Trust* have developed a helpful worksheet to condense your overarching goals into simple, actionable steps. Fill in your information and discover precisely what you need to do to reach your objectives.

## EXECUTION AND PROGRESS TRACKING

Now that you have established your annual, quarterly, monthly, and daily tasks, it's a matter of execution. If you've determined that you need to make ten prospecting calls per day to reach your goals, schedule time dedicated to that task in your calendar.

**Remember your board of advisors?** Educate them on the goals you've set for yourself and ask them to help keep you accountable. Be honest with yourself and commit to the process, monitoring your progress as you go.

It's also critical to remain flexible and be able to adjust. A plan is just a plan – at some point, things inevitably go off-book. Stay committed and get back on track, and don't forget to celebrate the successes and evaluate the setbacks along the way.



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## Reach Your Goals with a Strategic Sales Plan

Successful selling comes down to effective planning alongside a good dose of resilience and perseverance. Once you've established your goals, remember to be patient – things won't change overnight, but trust that you're on the right path.

Focus on building momentum and taking those little steps. Climbing Mount Everest is done one step at a time, after all.