

## Women in Industry: Joint planning can boost sales in 2019



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This time of year, the best distributors, reps and manufacturers talk a lot about “strategic planning.”

If you shudder when you hear those words, take heart: The process doesn’t have to be onerous. And the payoff is tremendous: By planning together now, you’ll not only enjoy more sales in 2019, but also deepen your strategic partnerships. Here are 10 tips to get you there by this time next year.

**Make joint planning a priority:** It’s easy to let “everyday emergencies” sabotage joint-planning meetings for the new year. If you’ve always had good intentions but never a plan on paper, schedule a joint-planning meeting now before time slips away once again. Activities not planned upfront either result in last-minute scrambles or lost opportunities (because then they don’t happen at all).

**Choose the right partners:** It's not feasible for distributors to develop a joint plan with each of their reps and vice versa. Instead, work with partners who are best aligned by product and offer the most opportunities for growth through more volume, conversions, new customers and lines. Where do you fit in your partner's plans?

**Start small:** If this is your first joint plan, choose only one or two initiatives and get a victory first before tackling more. Job 1 simply is to *begin*. Do only what you can do well together.

**Focus on function, not form:** Joint plans can be formal or informal, long or short, quarterly or yearlong. They can be captured in a spreadsheet, on a calendar or in an outline. They can focus on one or several key lines from one or several key manufacturers. Do what works for you.

**Prep first:** Before the joint-planning meeting, email some proposed goals and action items for your partner to consider. During the meeting, you can discuss and decide where goals and action items best align.

**Include your manufacturer regional managers:** Regional managers can provide valuable information about market trends, future product launches and potential marketing support for your joint initiatives.

**Meet face-to-face for joint planning:** *Discuss current products, sales and market share, plus new opportunities.* For example, are there new products, salespeople, jobs or market segments? New distributor locations or manufacturer plant expansions? Any regulatory, local board or code changes? New market trends, such as a downtown housing boom or spike in commercial construction? *Set sales growth goals* based on targeted customers and any new opportunities. *Determine activities, schedule and budget.* Consider training and certifications, plant tours, special events and promotions, and marketing dollars available.

**Decide who will do what and by when:** Each partner should assign a champion for the plan who ensures all tasks get done.

**Follow-up:** Quarterly check-ins aren't enough. Schedule a 10-minute call weekly to touch base on activities so the plan stays on track.

**Measure the results:** If you offered new product training, plant tours and certification programs, how many people attended? Did sales increase? What about market share? If you launched a new digital platform, which customers logged in? How long and how often did they engage? Did sales increase as a result?

A joint plan that's developed now and executed well can help distributors, reps and manufacturers take their relationship — and their businesses — to new levels in 2019.

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