

DISTRICT BUSINESS PLANNING & RESOURCE ALLOCATION PROCESS

Manager

Manager and Team

**Phase I.
Align Corporate
Business
Strategies with
Local Assessment
of Your Business**

**Phase II.
Develop District
Plan with Resource
Considerations in
Alignment with the
Business Strategy**

**Phase III.
Develop Local
Action Plans
Aligned with
Strategy and Goals**

**Phase IV.
Execute, Monitor,
and Recalibrate
Plans**

- 1.1 Translate understanding of corporate goals in order to establish area goals.
- 1.2 Assess District sales history and trends
- 1.3 Conduct SWOT analysis and After Action Review of previous year to assess what drives sales performance.
- 1.4 Assess your people against business performance.

- 2.1 Identify the "critical few" priorities that must be achieved to operationalize the corporate strategy.
- 2.2 Identify the broad "mix" of resource considerations given District strategy and objectives.
- 2.3 Establish targets for the overall District and for each sales representative.
- 2.4 Develop a human capital plan to address direct reports' capability gaps.

- 3.1 Use business reports to understand overall business, especially how concentrated your business is and to identify growth opportunities.
- 3.2 Translate sales quota to action plans by breaking down overall quota and establishing performance targets by product and time period.
- 3.3 Engage in specific account planning (e.g., top 10) and allocation of resources: Assess range of resources and apply resources to plans.
- 3.4 Review, consider, and incorporate specific strategic account targets.
- 3.5 Establish metrics and milestones to monitor effective execution.

- 4.1 Review accounts and recalibrate plans related to targets and established milestones.
- 4.2 Review, revisit, and revise throughout the year in regularly scheduled business reviews.