

ACHIEVING YOUR VISION FOR SUCCESS



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and Growth

Achieving Your
Vision for Success

HIGH PERFORMERS
GUIDE TO BUSINESS
GROWTH:
**FORGING THE PATH
TO SUCCESS
THROUGH VISION
AND CONVICTION**





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CREATING THE VISION FOR FUTURE SUCCESS

Creating the Vision for Future Success (conviction)

Belief and conviction are the keys to achieving goals and dreams. But as business owners, the challenge is often getting your team to feel the same.

By creating a clear vision, building the right systems and processes, aligning products and services, and utilizing the team's gifts and talents, success in achieving your goals and dreams becomes inevitable.

Here are questions to consider when creating your vision:

- What do you want to achieve?
- Why do you want to achieve it?
- When do you want to achieve it?
- Who benefits, and how do they benefit, when it is achieved?



BRANDING THE VISION FOR AWARENESS

Branding the Vision for Awareness (recognition)

A visual representation of the vision, in the form of a logo and tagline, printed on stickers, hats, shirts, mugs, and more, will bring your vision to life within the organization and give it the recognition it needs to succeed.

Here are the steps to creating your vision's brand:

- Create a logo including your vision tagline
- Choose your print mediums.
- Share them with your team.



MARKETING THE VISION FOR ENGAGEMENT

Marketing the Vision for Engagement (communication)

Talking about your vision on a consistent basis will keep it in its proper place...at the forefront of all that you do. You must keep your team interested and engaged in the vision, driving them to do everything they can in order to achieve it.

Consider the following when communicating your vision:

- What will you say about the vision?
- Where will you talk about the vision?
- How often should you talk about the vision?



CONNECTING THE VISION FOR CONSISTENCY

Connecting the Vision for Consistency (integration)

The more that your vision touches and the more that touches your vision, the more likely you are to achieve it. Consider every aspect of your organization, from its processes to its people, and ensure that in some way all things impact and are impacted in pursuit of your vision.

How will your vision impact and be impacted by:

- Hiring, recruiting, and training?
- Team performance and compensation?
- External marketing and business development efforts?
- New product and service offerings?



CELEBRATING THE VISION FOR MOMENTUM

Celebrating the Vision for Momentum (multiplication)

It's not enough to celebrate your vision when you achieve it, you need to celebrate every bit progress along the way. On your roadmap to vision success, you will create checkpoints to be celebrated when they are reached. This will not only keep the momentum strong, it will multiply the momentum and greatly increase the likelihood of achieving your vision.

Here are the steps to build momentum:

- Create your roadmap.
- Establish checkpoints for progress.
- Determine celebration metrics/standards.
- Celebrate and succeed.

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More Freedom.
More Fulfillment.
More of Who You
Are.

Achieving Your
Vision for Success

HIGH PERFORMERS GUIDE TO SALES SUCCESS: CREATING YOUR SALES OPERATING SYSTEM





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INTRODUCTION

Organizations need a sales playbook, an outline of methodologies and tactics designed to help them consistently achieve and exceed revenue goals.

But it needs to be more than a piece of paper on the desk or a document sitting in the cloud.

The best playbooks are living documents. They create a clear, consistent, and sustainable methodology that allows you to achieve revenue goals through purposeful and intentional culture, structure, marketing, and sales efforts.



COMPANY CULTURE

Your company culture is very important to how your team sells, how your prospects buy, and how your clients experience what you have sold them.

Your company culture defines who you are as an organization, why you serve the industry you do, and what you hope to accomplish long term.

NEVER OVERLOOK THE POWER OF A STRONG MESSAGE, THOUGH YOUR MESSAGE IS ONLY THE BEGINNING.

DEFINE

- Mission
- Vision
- Values



TEAM DEVELOPMENT

In order to build and maintain a high-performance sales team, you should begin by defining the necessary characteristics for each role. From there, you can create the process to locate, hire, and develop each member in order to set them up for success individually and corporately.

ROLES

List all sales-related roles that currently make up your team as well as roles you seek to fill

SUCCESS METRICS

Describe the metrics you will use to measure success for each team role



TEAM DEVELOPMENT

HIRING

List your internal and external sources for recruiting, create your multi-step interview process, as well as your process for hiring new team members

SPRINTING TO SUCCESS

Create an effective onboarding, training, and initial development process

SUSTAINING SUCCESS

Include your ongoing training and development systems, processes, timeliness, and metrics



SALES AND BUSINESS DEVELOPMENT

Achieving sales success requires an authentic and attractive brand, clear and compelling messaging, as well as consistent and professional execution.

BRANDING

PERSONAL BRAND BUILDING

- This includes your purpose, passions, and principles as well as the big question “What do you want to be known for?”

PERSONAL TO CORPORATE BRAND ALIGNMENT

- This describes how your personal brand aligns with your companies corporate brand as well as how others can achieve similar alignment.

PROSPECTING

IDEAL CLIENT PROFILE

- Describe your ideal client in as much detail as possible.

SCRIPTS

- Include your basic intro/30-second “elevator pitch”, requests for various meetings, and any other dialogue you would regularly repeat.



SALES AND BUSINESS DEVELOPMENT

TOOLS AND PROCESSES

LEAD MANAGEMENT

- This is how you manage your prospects with the proper data as well as your engagement flow and could be a digital resource or hard copy document.

21 DAY PROSPECT PURSUIT

- Once a new prospect is identified, this is your initial outreach process and includes specific actions and timelines.

SALES METHODOLOGY

CLIENT CONVERSION

- This is your complete client conversion journey and includes how and when you will communicate with them, what you will say, and how you will ensure a client win.

REFERRALS

REFERRAL TRAINING

- This is your complete client conversion journey and includes how and when you will communicate with them, what you will say, and how you will ensure a client win.

REFERRAL STRATEGY

- This is how you will identify, request, reach out to and follow through on referrals sent to you or generated by you.



THE NEXT STEPS

Additional topics that may be included in your Playbook

01.

Building trust with Prospects, Clients, and COIs/Partners

02.

Social Media Engagement Strategy

03.

Successful Meeting Prep

04.

High Performance Productivity



LET IT BREATHE

Consider every item shared in this playbook.

Each is important to your **success**.

But as was shared from the beginning, this sales playbook must be more than a static document.

**IT HAS TO LIVE AND IT
HAS TO BREATHE.**

When you put your heart and soul into your playbook, and bring your team(s) along with you for the ride, you will find more success than you thought possible!

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HIGH PERFORMERS GUIDE TO **LEADERSHIP AND GROWTH**





BECOMING THE BEST ME

We all want to be better than we were yesterday. And we are all working towards something. So it is important to remember that defining our foundation is as important as defining our desired destination. This tool will help you to do both.

Foundation

Our Foundation is made up of who we are and what we are called to. I like to call these our purpose, principles, and passions. Whether this is your first time defining these things, or you have done it for many years, take time to write out each area of your Foundation below.

Purpose

This is the reason by which you believe you stand on this earth. Why are you here? What were you created to accomplish? Some may call this your “why” or your “mission”.



BECOMING THE BEST ME

Principles

These are deep-seated beliefs about who you are and how you want to be represented. They made include single words or simple statements. Most people desire to live and breathe these principles and do their best to make all of their decisions using their principles as a filter.

Passions

These are the things that get you out of bed every day, light a fire under you, or would cause you to go to the ends of the earth to care for and protect. They may also include things that excite you and have you always speaking about.



DESIRED DESTINATION

Personal

While I am learning to be content with who I am, I want to continue growing into the best version of myself. Who is that person? What positive habits do they have? What negative habits do they avoid? How will my mental and physical health improve? What will make me most happy?

By _____, I will have accomplished:

My plan to achieve:



DESIRED DESTINATION

Professional

I am not my company, my career, or my job. But it plays a huge role in allowing me to be a better person, contribute to those around me, make an impact, and live with more freedom.

By _____, I will have accomplished:

My plan to achieve:



DESIRED DESTINATION

Financial

Money is not everything. But money is an amazing tool to find freedom, to make an impact, and to support myself and others. I need to be intentional in earning, saving, giving, and investing money.

By _____, I will have accomplished:

My plan to achieve:



DESIRED DESTINATION

Relational

I was not created to be alone. I have been called to contribute to and reap the benefits of amazing relationships with my family, friends, coworkers, and community members.

By _____, I will have accomplished:

My plan to achieve:



DESIRED DESTINATION

Spiritual

My understanding of God directly affects my ability to see myself for who I am, to see the world for what it is, to work, to be in relationships, and even to manage my finances. I want to be confident in what I believe as well as how I will live that out so I can live my life in the best way possible.

By _____, I will have accomplished:

My plan to achieve:



STAYING THE COURSE

REFLECTION

1. Reflect on any past "moments" of significance in each of the five areas:
 - a. Personal
 - b. Professional
 - c. Financial
 - d. Relational
 - e. Spiritual
2. Read through any written goals from the previous year and then be honest about what I hit, what I didn't, and what caused the hits AND misses.
3. Read my personal mission statement and see if anything has changed...or even gotten off track.

NOTES



STAYING THE COURSE

REALIZATION

1. Consider all of the great things that have happened in my life.
2. Realize that many of the “worst moments ever” were but “light and momentary”.
3. Be honest about what my life looks like to others.
4. Be sure I am moving forward.

NOTES



STAYING THE COURSE

REINFORCEMENT

1. What's most important to me? Does my life image it?
2. What has to change?
3. What needs to be a priority?
4. What needs to be written down so it gets done?

NOTES

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