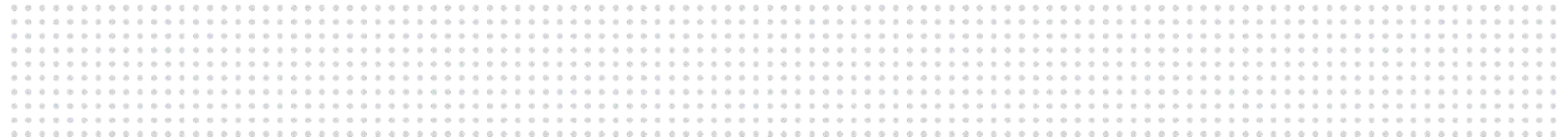


Building a rockstar business development plan

Presented by Bill.com



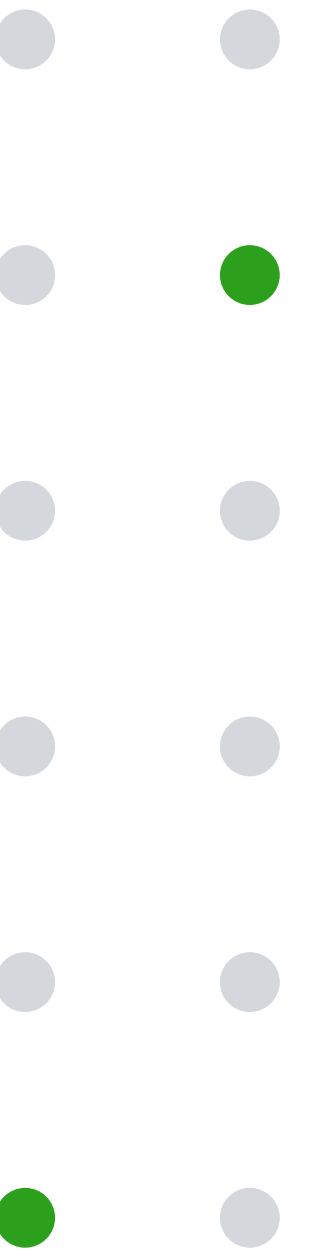
AGENDA

Key elements of a rockstar BD plan

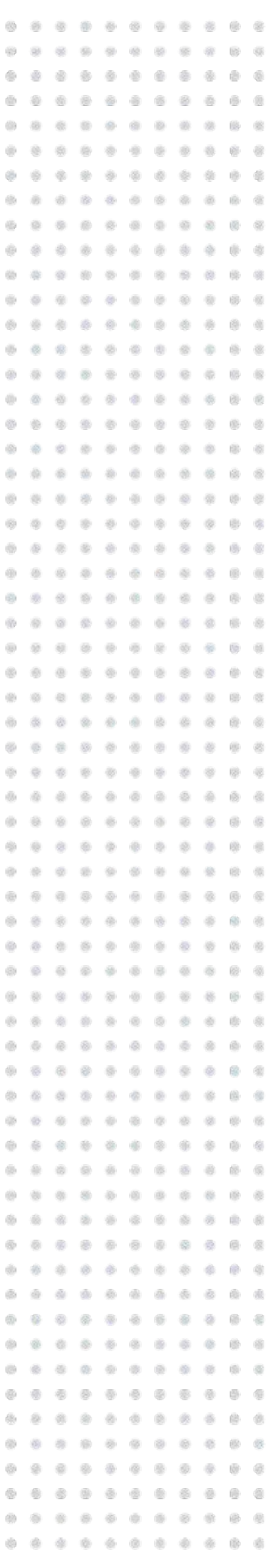
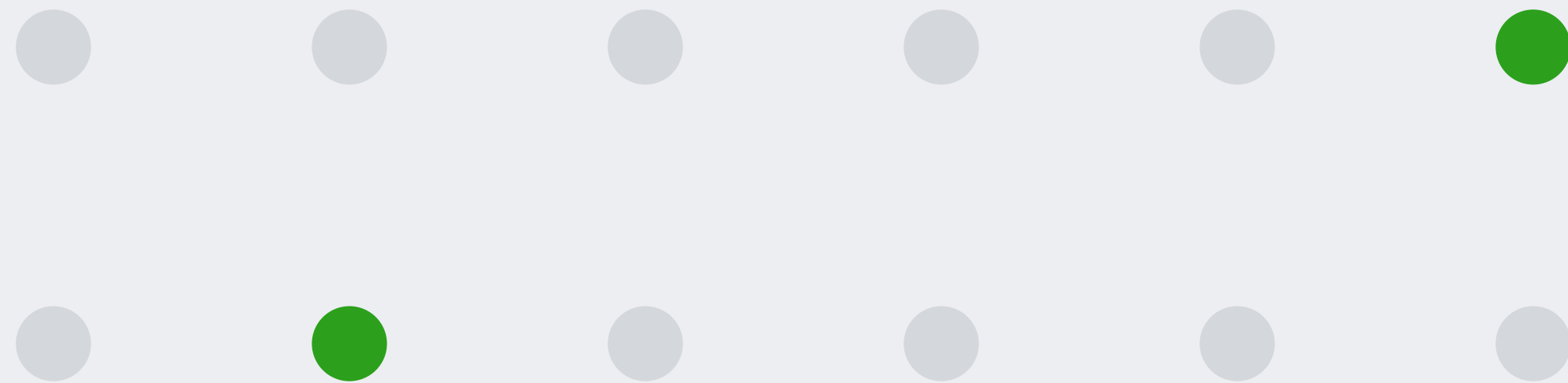
Choosing verticals to amplify growth

Ideas to keep your plan from gathering digital dust

Diversification strategies to help you thrive in disruption



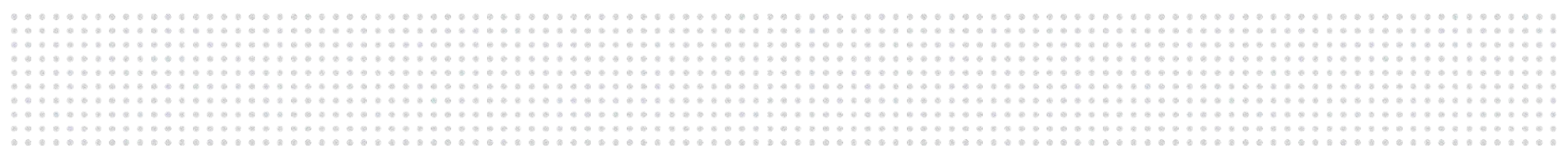
ELEMENT 1: GOALS & MILESTONES



Thinking strategically about goals and milestones

Vision for the year

- What will the firm/business look like at year end?



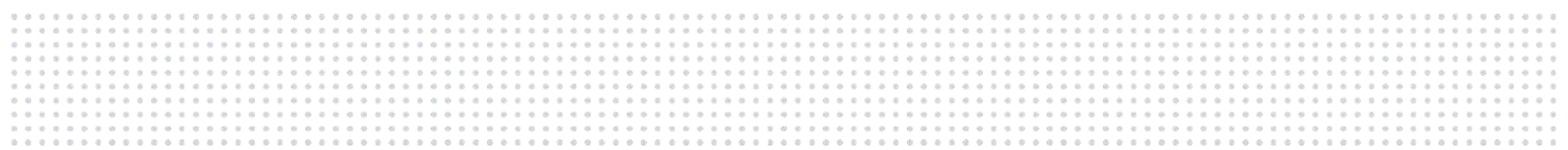
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Revenue

- What are our revenue goals by service line?
- Where are our growth or innovation opportunities?



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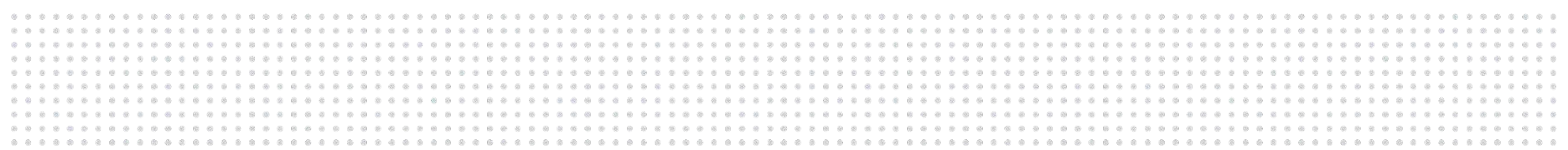
Profit

- What are our bottom-line growth goals by service line?
- Where are our opportunities to increase profit/reinvest in the business?

Thinking strategically about goals and milestones

New client growth

- What are our specific new client growth goals — per service line?



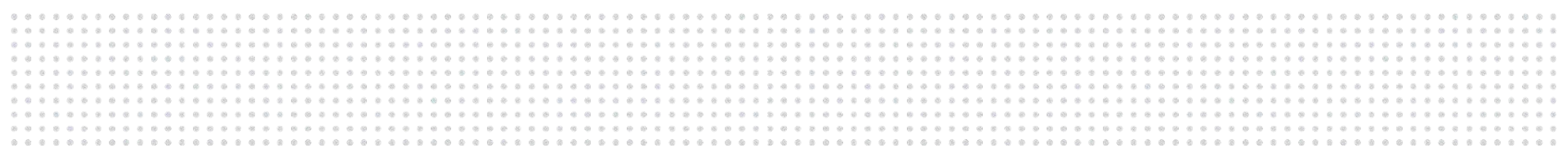
Thinking strategically about goals and milestones

New client growth

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Existing client growth

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- Signifies major opportunities that most firms/businesses overlook



Thinking strategically about goals and milestones

New client growth

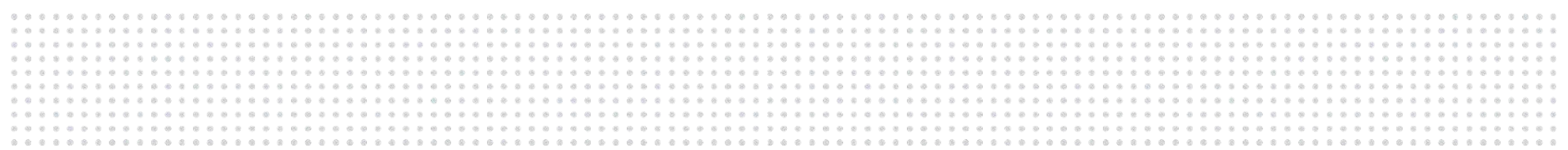
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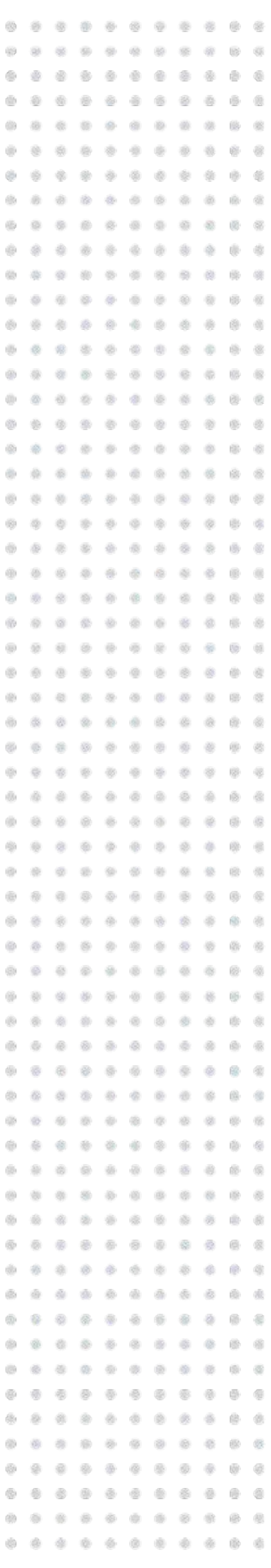
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Game changing goal

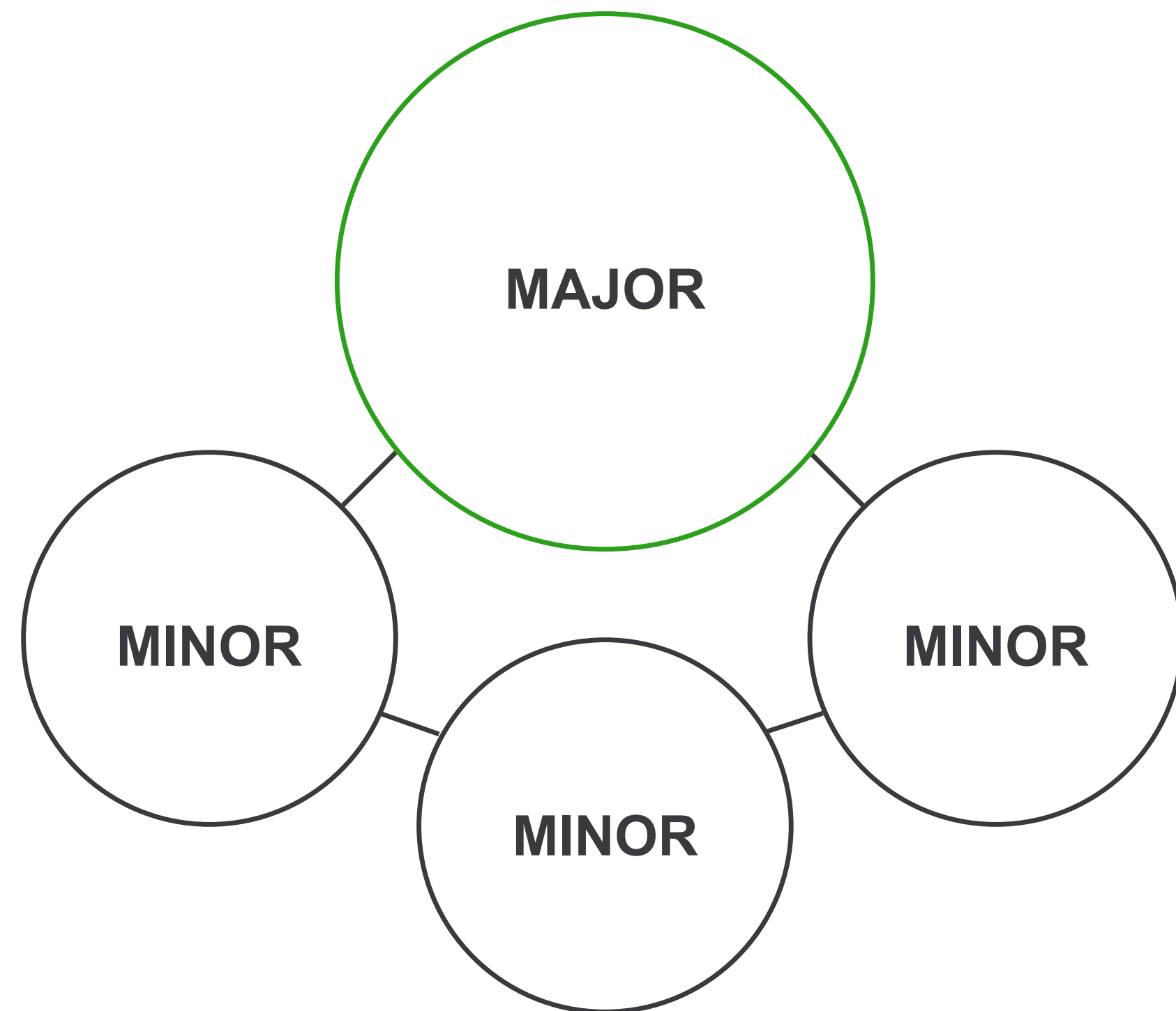
- What is a game changing stretch goal that our firm can rally behind?



ELEMENT 2: VERTICALS

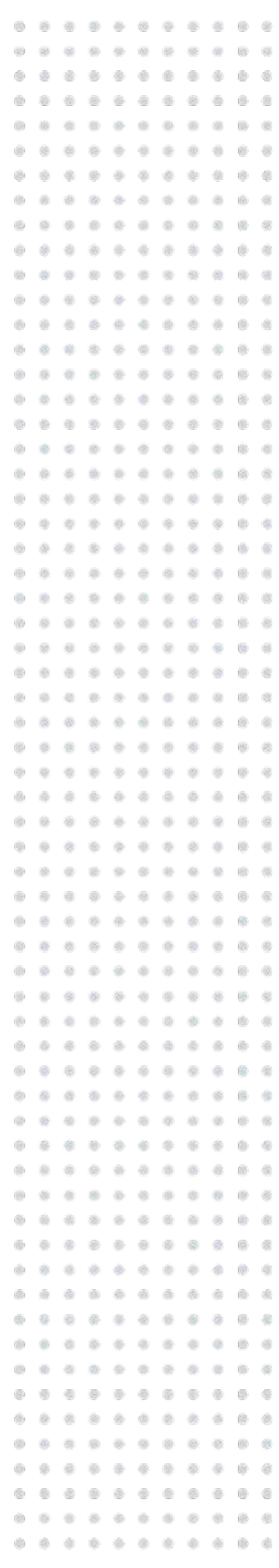
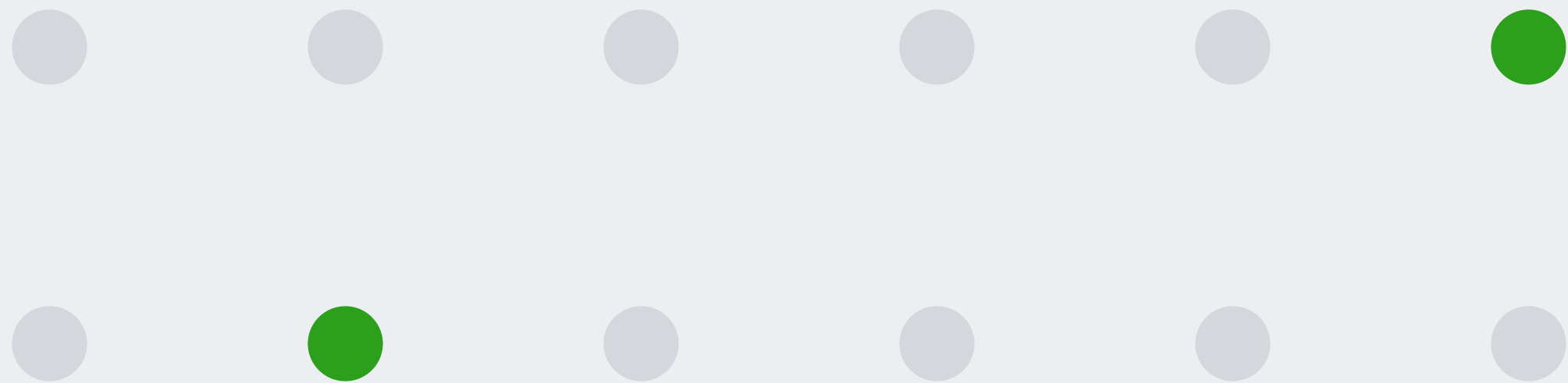


Verticals can lead your firm or business to rockstar status

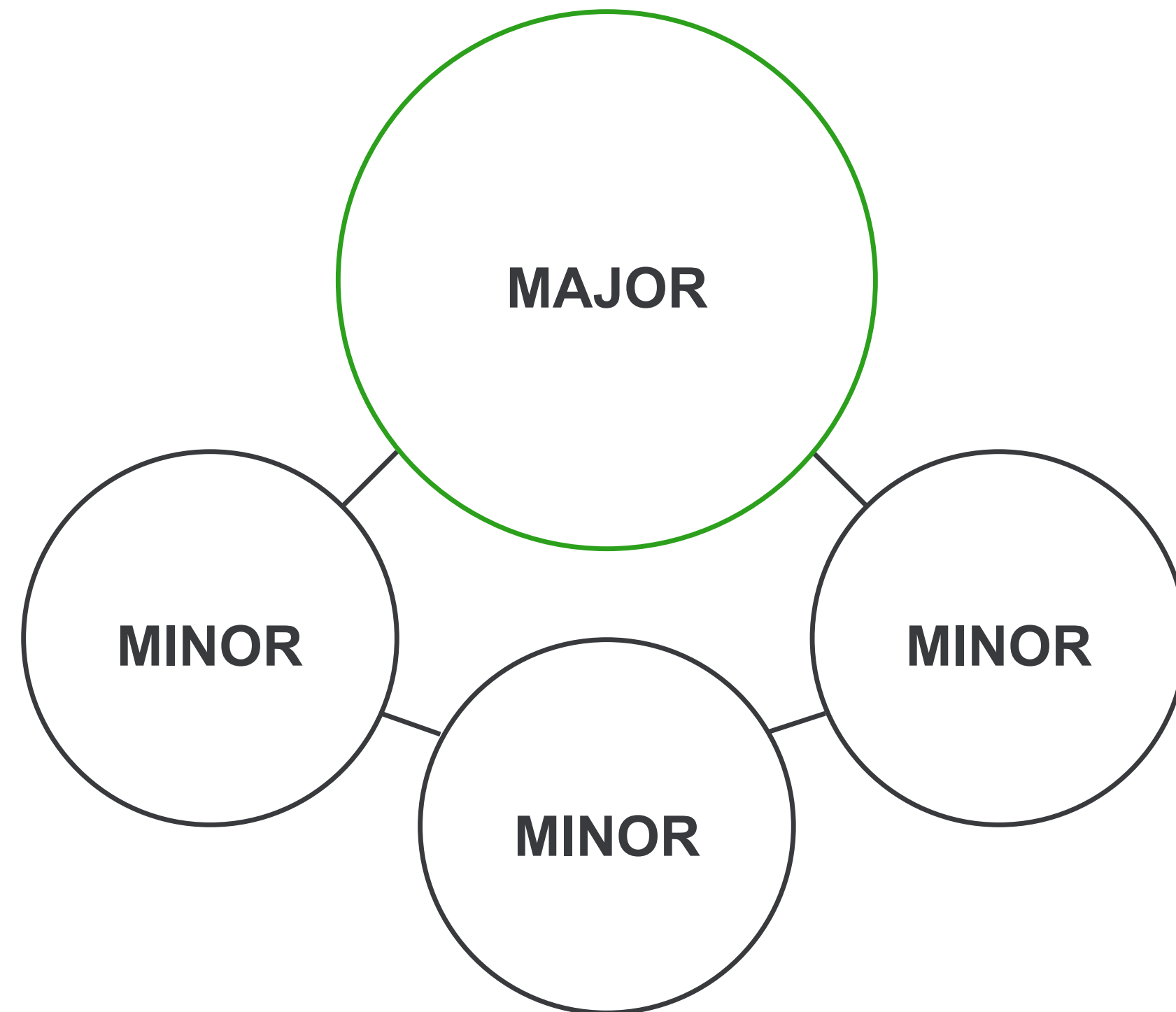


- In reviewing your client base today, where do you see vertical majors and minors?
- In which verticals does our firm/business already have recognized expertise?
- Which verticals most interest me or where can I best develop a brand identity?
- Which verticals present the greatest opportunities over the next 1–3 years?

ELEMENT 3: IDEAL CLIENTS

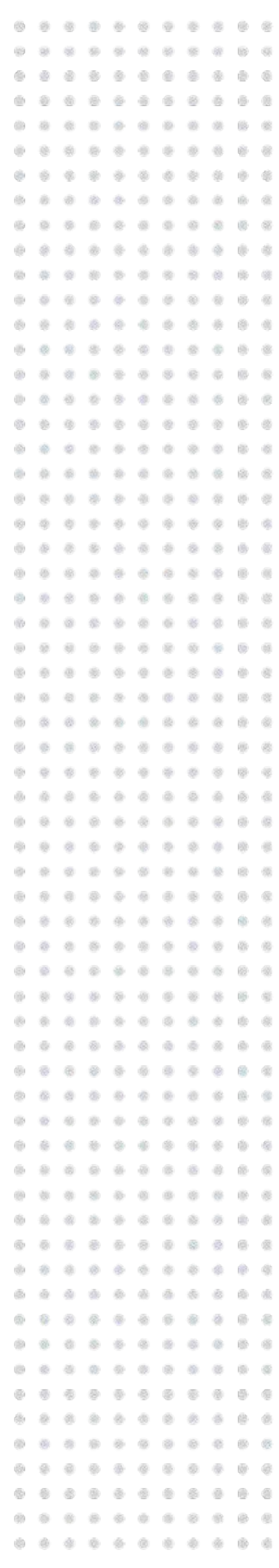
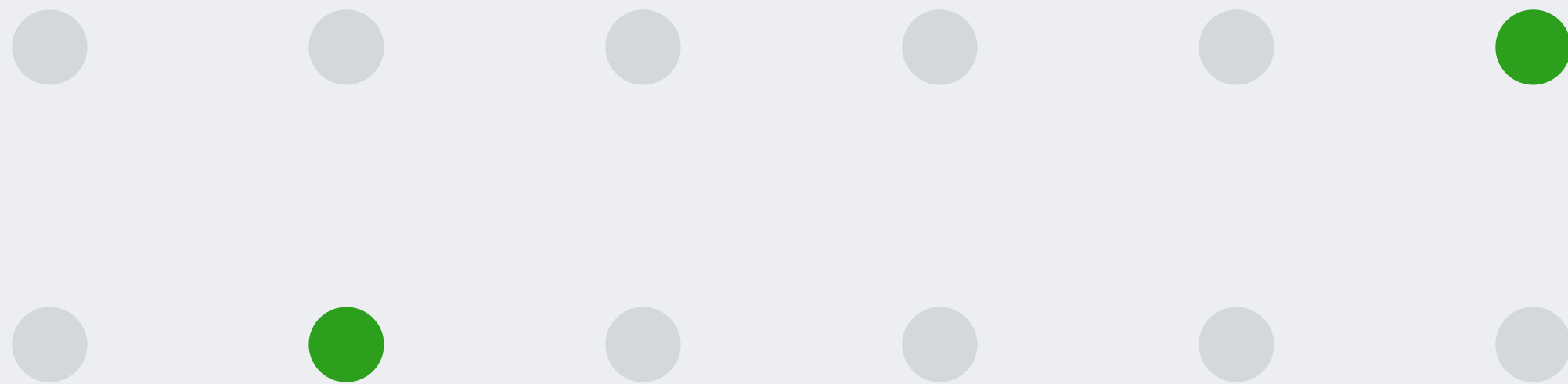


Ideal clients can 25x your growth



- Are you clear on your ideal clients?
- Curated list of Top 25 ideal clients per vertical major and minor
- Access to high-impact relationships are critical to being an ideal client
- All activity is tracked in your customer relationship management tool (CRM) for accountability

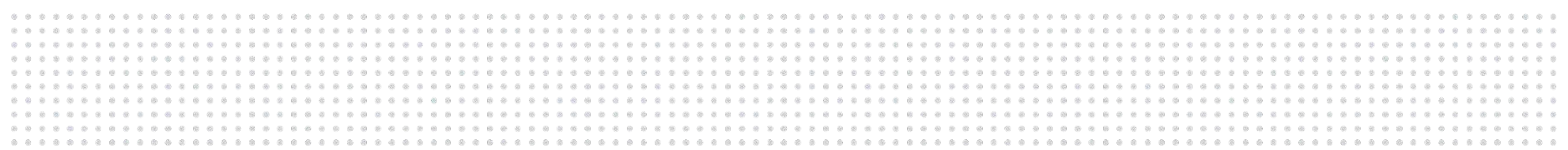
ELEMENT 4: ADVISORY INTELLIGENCE



Advisory intelligence uncovers more opportunity

Industry trends

- Indicators impacting their business over the next 1–3 years



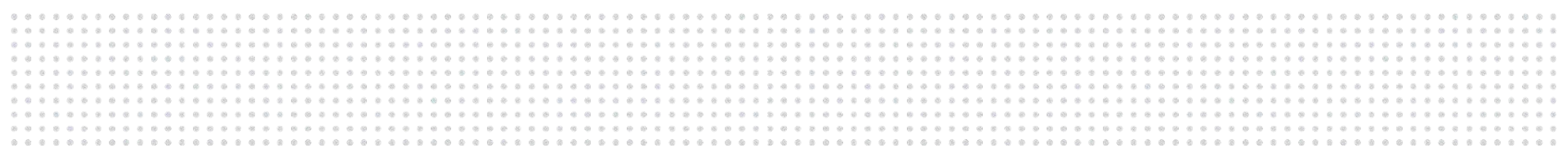
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Leadership vision

- Strategic outcomes desired by leadership teams over next 1–3 years



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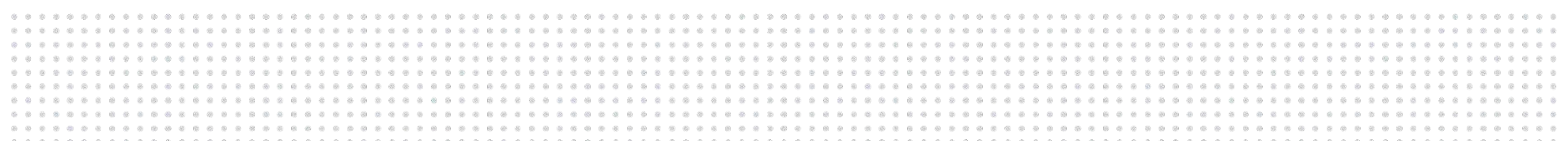
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Organizational challenges

- Limitations hampering the ability to achieve leadership's goals (people, process, product, technology /internal or external sources)



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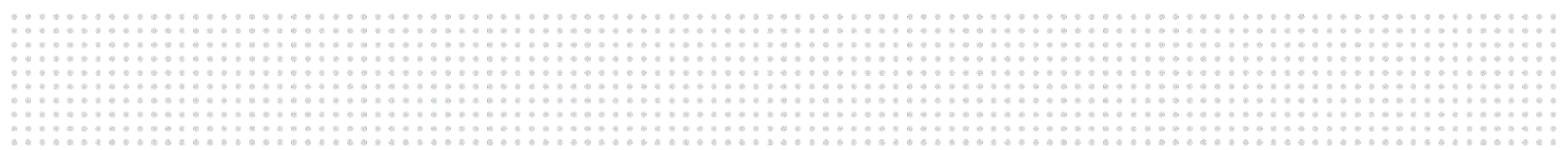
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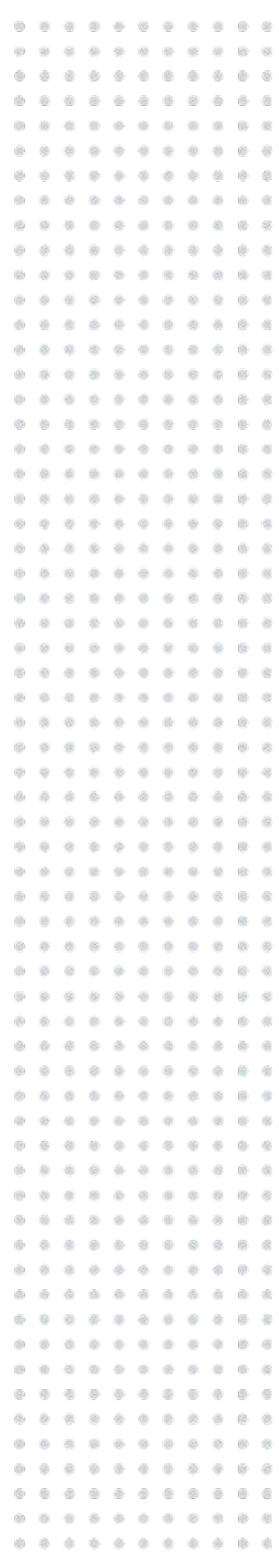
- Limitations hampering the ability to achieve leadership's goals (people, process, product, technology /internal or external sources)

Key initiatives and fiscal goals

- Major projects and performance indicators



ELEMENT 5: RELATIONSHIP PERSONAS



Create personas for your key verticals



Create personas for your key verticals

Four high-impact relationships

- Decision makers, advocates, centers of influence, strategic alliances
- Need a place to start? Decision makers and strategic alliances

Create personas for your key verticals

Four high-impact relationships

- Decision makers, advocates, centers of influence, strategic alliances
- Need a place to start? Decision makers and strategic alliances

Use these to guide your BD process and conversations



Who is/are your decision maker(s)?



What are their top responsibilities?



What is the person measured on?



What are the key challenges?

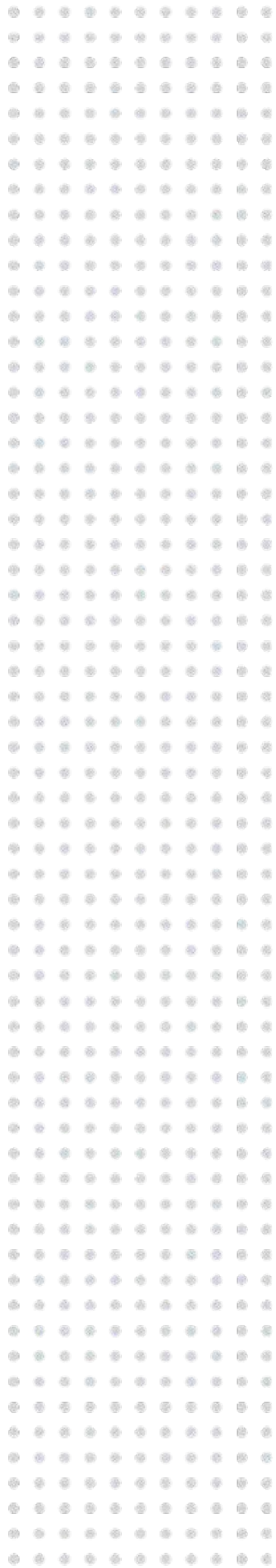
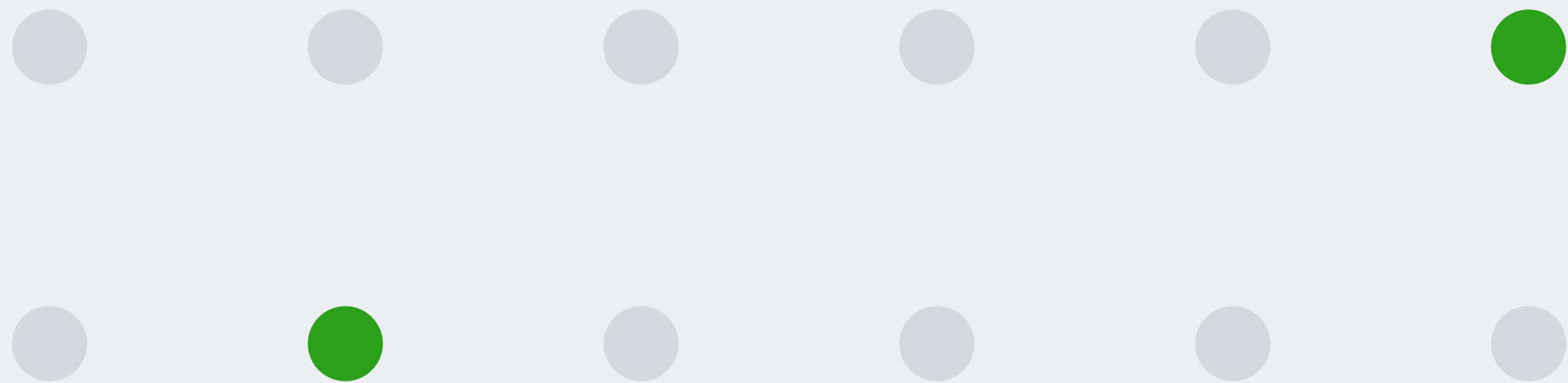


What will make change difficult?



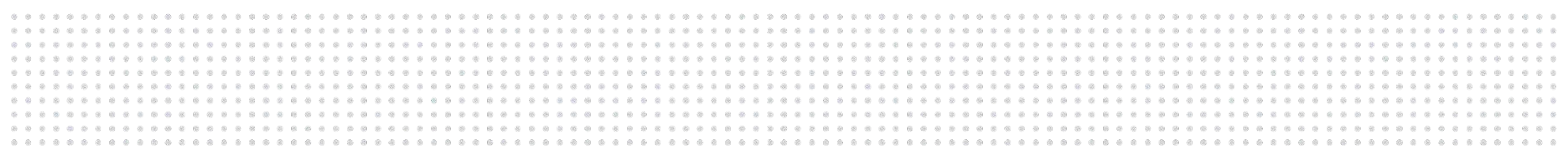
What does success look like?

ELEMENT 6: STRATEGIC ALLIANCES



Strategic alliances are an extension of your firm / business

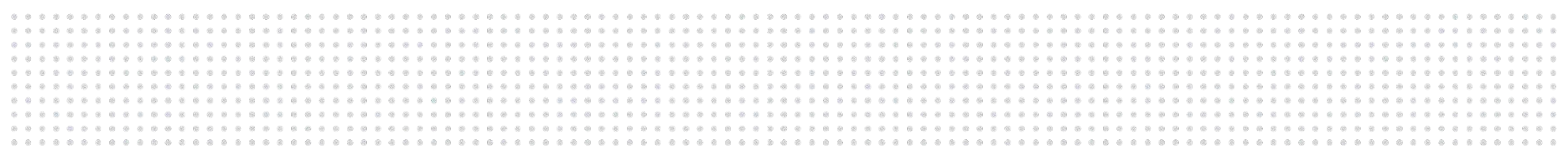
What key partnerships will accelerate growth and create mutual benefit?



Strategic alliances are an extension of your firm / business

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Centers of influence (individual/organizational)

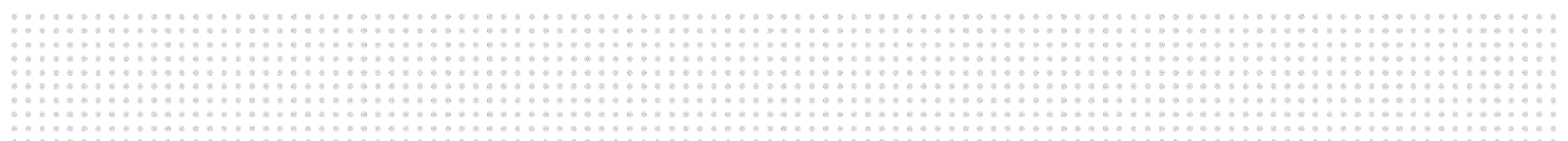


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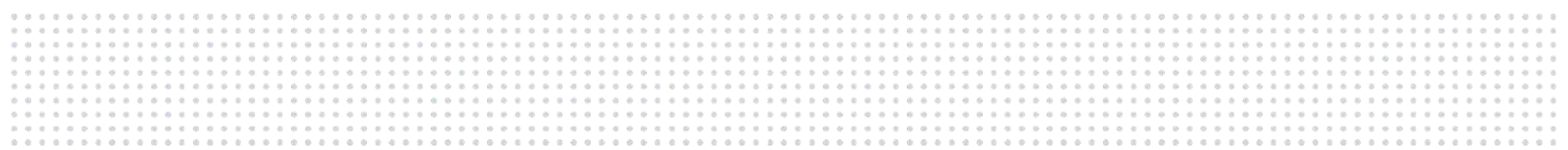
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Complimentary business partners



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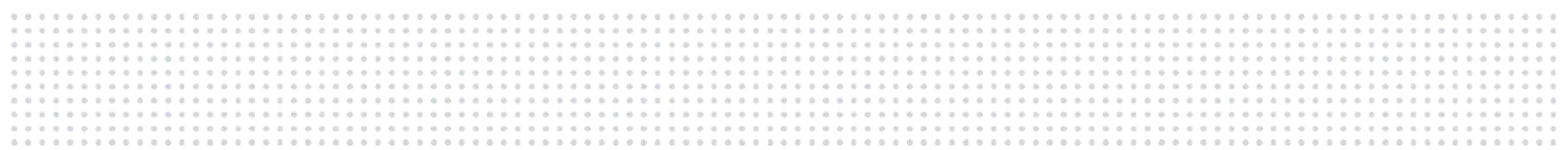
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Technology partners (like Bill.com)



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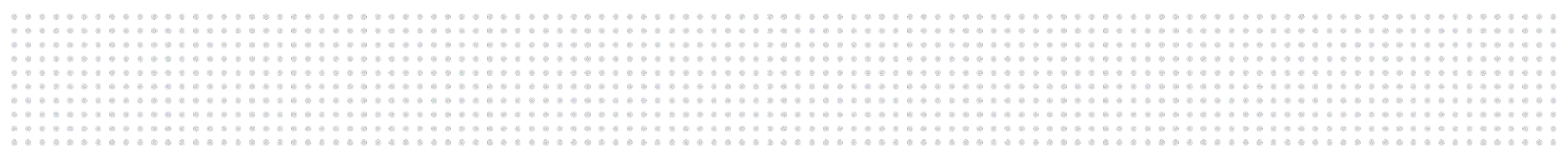
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Research organizations



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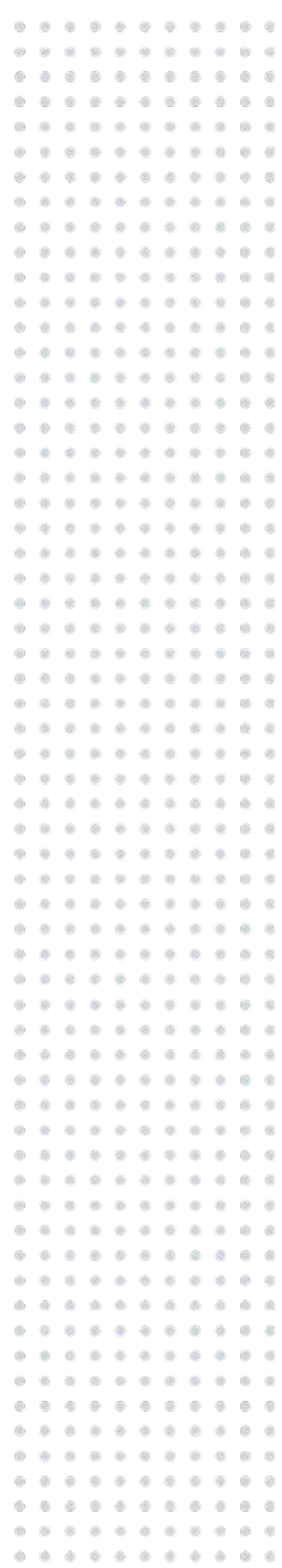
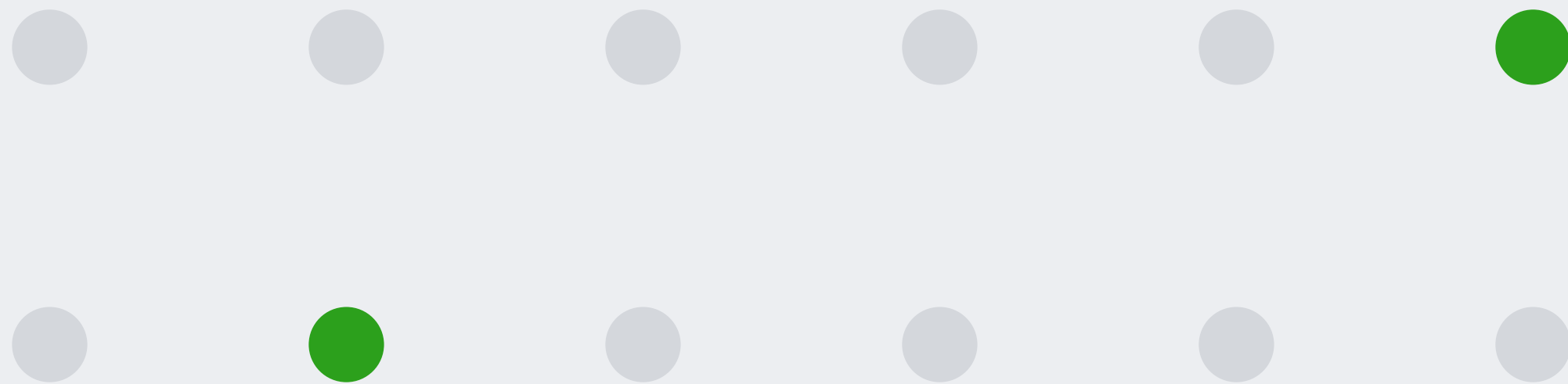
Complimentary business partners

Technology partners (like Bill.com)

Research organizations

Create a list of strategic alliances based on your verticals, then determine the appropriate investment — financially, with your time or both

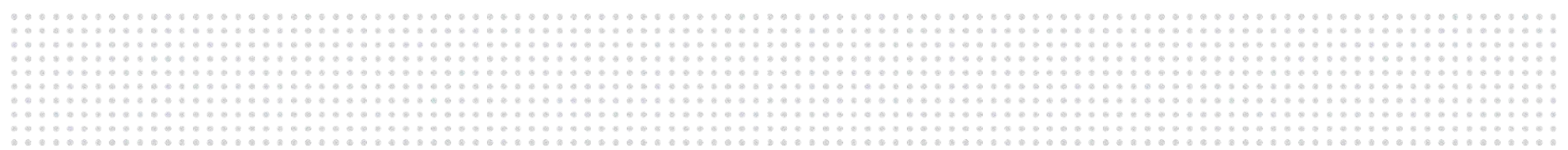
ELEMENT 7: YOUR BRAND PRESENCE



Your personal brand and firm brand elevate loyalty

What is your plan to consistently build your firm's brand and your personal leadership brand?

Your leadership identity matters to growth. Your strategy includes both digital presence and offline presence.



Your personal brand and firm brand elevate loyalty

What is your plan to consistently build your firm's brand and your personal leadership brand? Your leadership identity matters to growth. Your strategy includes both digital presence and offline presence.



Social media,
and specifically
LinkedIn for B2B



Webinars



Original thought
leadership



Marketing
campaigns and
email list building



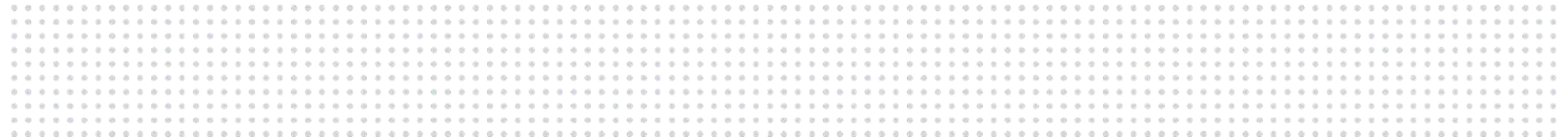
Consistent blogging
on your firm site or
via guest posting



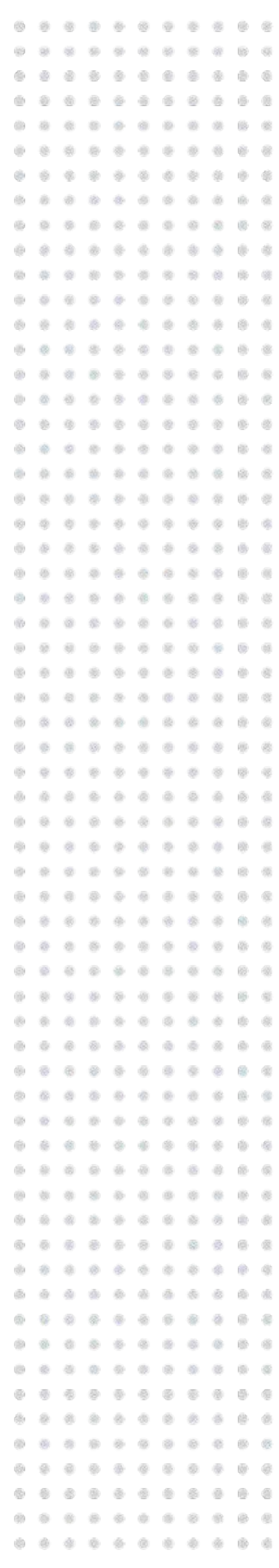
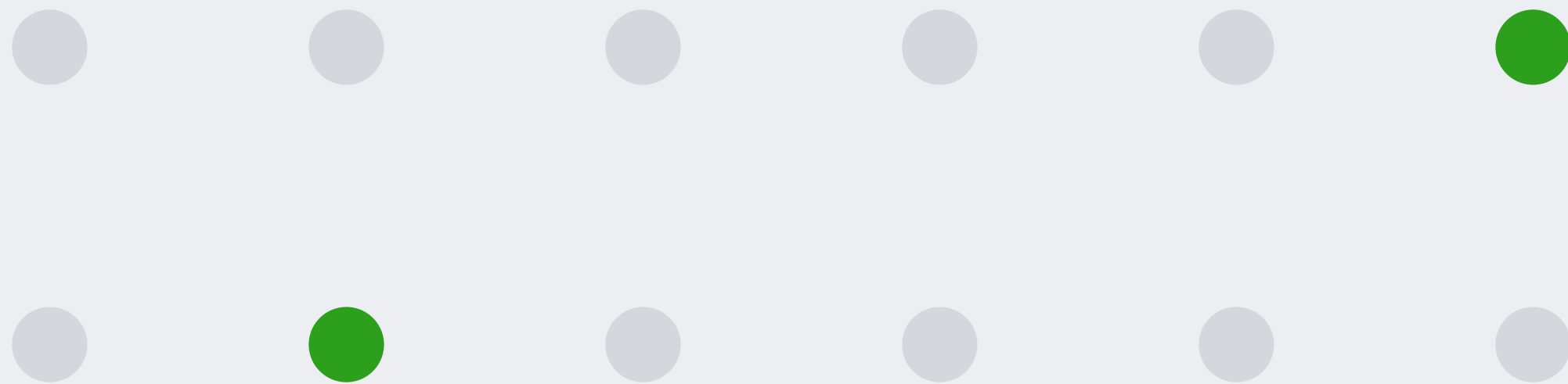
Event and forums



Podcasts



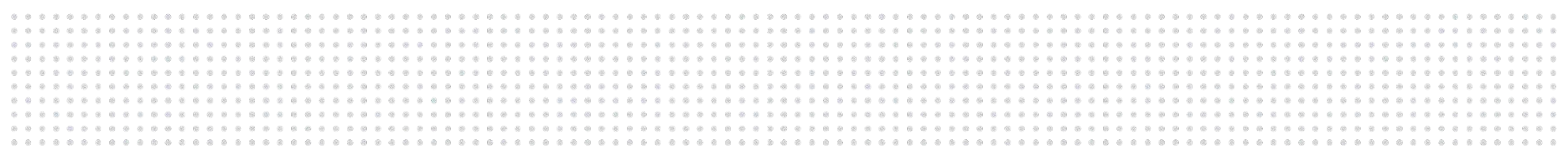
DIGITAL DUST & DISRUPTION



Rockstars keep BD plans from gathering digital dust

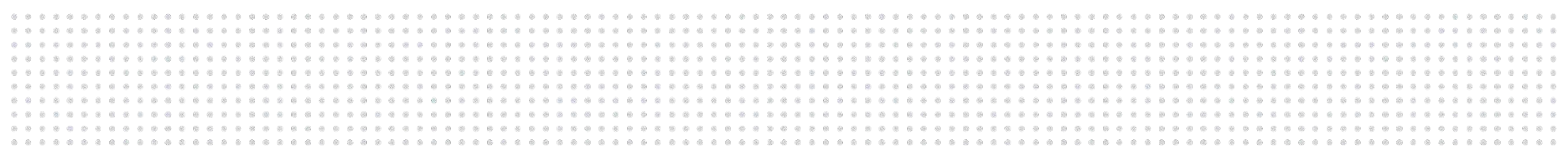
Strategies to keep momentum and make continual progress

- Accountability partner
- Consistent reviews firm/company wide
- Use in 1:1 coaching calls
- Integrate with your CRM
- Make it easily accessible and commit to reviewing weekly on your own
- Integrate into your P&L if possible and commit to financial reviews



Thrive in disruption with business plan diversity

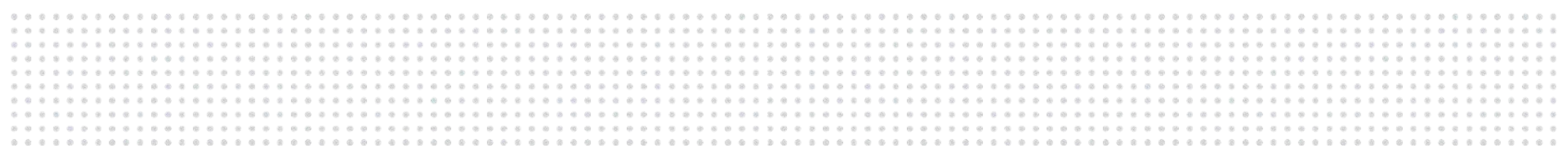
How can you
continue to thrive
even when disruption
is all around you?



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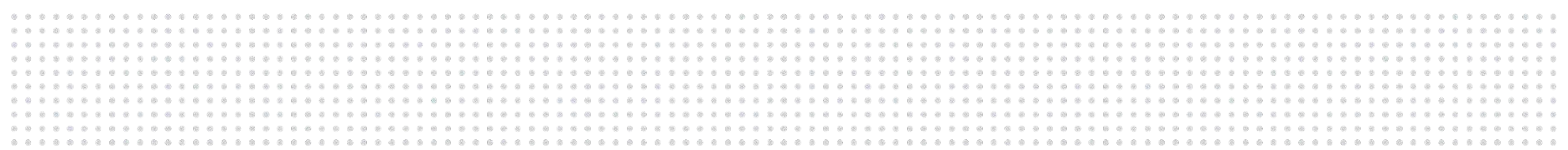
- Vertical choices and curating



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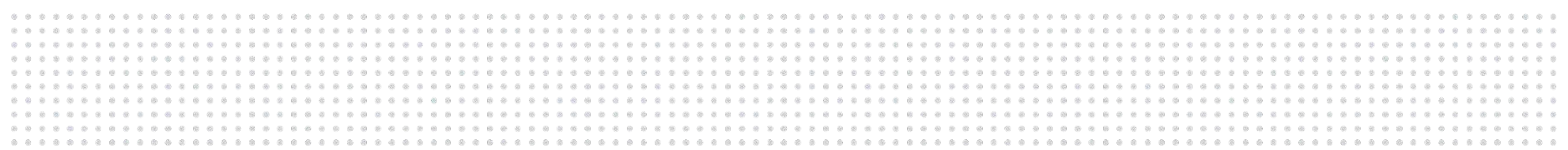
- Vertical choices and curating
- Innovation in services, offerings and fee structures



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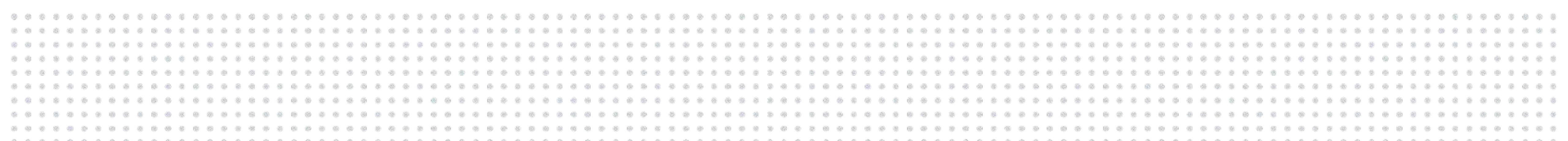
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- Innovation in services, offerings and fee structures
- Maintaining your ideal clients — don't give into the pressure of bringing less-than-ideal clients onto your roster



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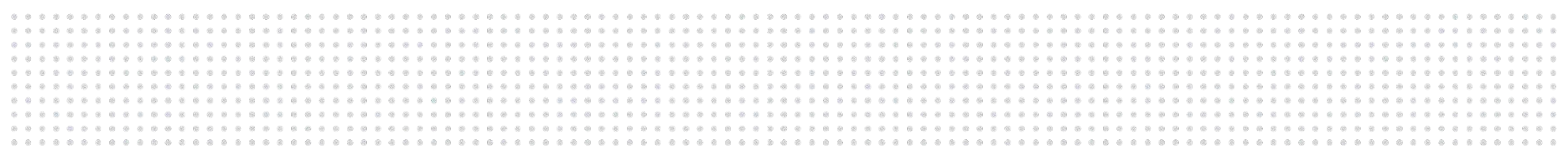
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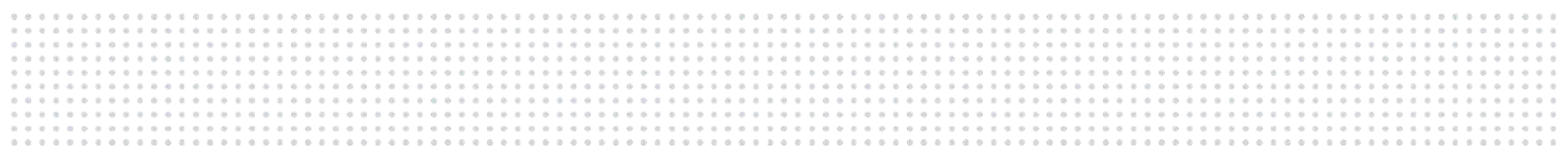
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- Anticipate pivots and remain open to change



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How can you continue to thrive even when disruption is all around you?

- Vertical choices and curating
- Innovation in services, offerings and fee structures
- Maintaining your ideal clients — don't give into the pressure of bringing less-than-ideal clients onto your roster
- Continual pipeline management
- Anticipate pivots and remain open to change
- Stay market forward



KEY TAKEAWAYS

- ✓ Your BD plan will provide the path
- ✓ Build verticals to amplify growth
- ✓ Use the 7 elements as your guide
- ✓ Simplicity can be powerful
- ✓ Choose one or two strategies for accountability
- ✓ Welcome disruption and stay agile



Thank you



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The Modern Seller
#ModernSeller

