



The Five Steps to Navigating the “Picky” Stage

Description

Regardless of industry, there comes a time in every sales person’s career when they enter the “picky” stage. It’s the stage when, due to time and bandwidth constraints that come along with maintaining, up-selling and cross-selling existing customers, a sales person needs to be particular with the business they take on and the customers they pursue. It is just not possible to go after every single prospect since there’s a limit to how much work can be done and how many accounts can be juggled.

How do you determine which new customers and accounts are worth pursuing for YOU and which are not? BDU outlines five important steps to take to help you decide:

1. **Analyze your existing client base.** This will help you determine how many clients you have at different levels as well as much time it takes to service these accounts. By first looking at your current clients, you can then figure out how much bandwidth you have remaining for new accounts.
2. **Analyze your business.** It is important to take a look at your business breakdown and quota so you know exactly how much new business you need to bring in to hit your numbers. Take your quota and subtract the anticipated revenue from your existing customers in both repeat and additional business. The remaining number is how much new business you need to bring in to hit your quota.
3. **Decide what makes a new prospect a “single,” “double,” “triple” or “home run” for you and which type you want to go after.** Based on revenue potential, determine what type of account makes up each category for you. Maybe your “home runs” are those that would bring in \$250K or more in revenue, “triples” are between \$150K-\$250K, “doubles” are between \$75K and \$150K and “singles” bring in less than \$75K. You will need to determine whether or not you just want to focus on larger [elephant](#) accounts or spread out your efforts a bit more to go after several smaller ones instead.
4. **Identify what your ideal client looks like and who you’ll target.** Analyze your clients and break them down into categories based on different criteria such as the type of business (corporate clients, nonprofits), size (number of employees or size of revenue) and

geographic location. Then, determine what your ideal client looks like based on the information you have. You also need to decide who you'll be targeting, whether it's the CEO, director, company owner or someone else in charge.

5. **Figure out how to articulate this information to your network.** Once you figure out which type of prospects you want to pursue, decide how you'll communicate this information to the people funneling you new referrals. This way, you are sure to get the correct types of leads for what you've decided to pursue.

It's not only fine but completely necessary to get a bit picky with the accounts you go after. You shouldn't try to close each and every deal you come across, and it is okay not to pursue all opportunities.

Managing your time and efforts based on your current needs and numbers will ultimately allow you to close more sales and meet and exceed your goals!

Need help analyzing your current numbers and goals to determine where to focus your efforts?

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Author

lisa-peskin