



The Four Phases of COVID-19 Recovery for Sales: Where Are You?

Mark Donnolo and Michelle Seger
SalesGlobe

COVID-19 took the world by storm and struck a blow to most sales organizations. The situation was new, frightening, exciting, and unknown from a business and personal perspective. We at SalesGlobe pushed beyond the initial, obvious challenges like how to deal with compensation and quotas to get to the roots of the issues: customer fear and the need to focus on helping customers rather than selling. We explored these ideas in our articles, [“Leading Through COVID-19: Addressing Your Real Sales Challenge”](#) and [“Don’t Panic. Four Steps for Sales Team Survival This \(or Any\) Crisis”](#).

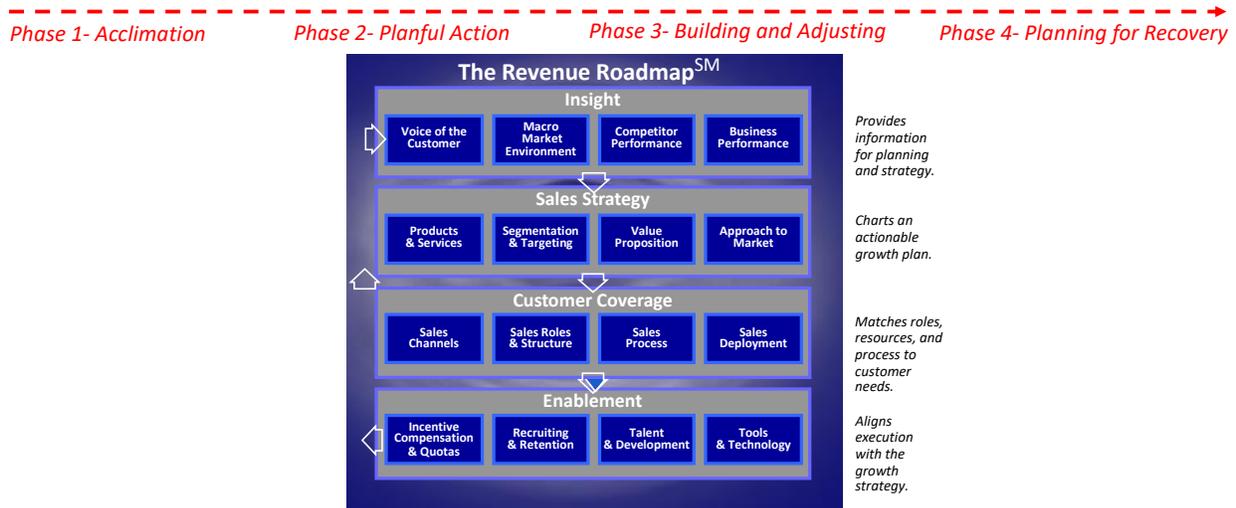
We also discovered that the COVID-19 crisis unfolds in four major phases that are predictable and provide a structure to evaluate performance and plan ahead with our clients:

- **Phase 1. Acclimation** occurs in the early stages of the crisis, as organizations re-orient and adjust to the new environment.
- **Phase 2. Planful Action** is the next step and occurs at the point when companies start acting on approaches to help customers and support the sales organization. This typically occurs after the first few weeks and differs by company size, industry and type of impact that the crisis is having on the company and its clients.
- **Phase 3. Building and Adjusting** continues in the subsequent months, as organizations formalize customer and sales organization programs they started during the Planful Action phase.
- **Phase 4. Planning for Recovery** is ongoing as most companies begin their post-COVID-19 planning, outlining what their new sales models will look like coming out of the crisis.

Let’s start with some broader context for how to think about sales within any environment. To approach COVID-19 from a sales discipline perspective, The Revenue RoadmapSM provides an integrated view of the four major competencies of successful sales organizations:

- **Insight** on customers, the market, and internal performance.
- **Sales Strategy** that determines direction for the organization in terms of customer and product focus.
- **Customer Coverage** that defines the organization's routes to market, sales organization and roles, and sales process.
- **Enablement** that supports the upstream disciplines through recruiting, development, technology, and incentive compensation.

COVID-19 Phases for Sales



As we look at the four phases, we'll frame them within The Revenue Roadmap disciplines. Understand where you are within the four phases, how you're performing, and what lies ahead. Here's a look at each of the phases, what you should consider, and what you might plan for:

Phase 1. Acclimation. During Acclimation, companies begin to understand the immediate realities, such as shelter-in-place, for their sales organizations and customers and start to address immediate concerns about the crisis. Examine the steps your organization should take, by discipline, during Acclimation:

Voice of the Customer

- Communicate with customers at the start of the crisis about your approach to work with them.
- Connect with customers to get insight on their needs by understanding rather than selling.

Business Performance Planning

- Provide direction to the sales team on the approach and procedures for updating forecasts at an account level.
- Review sales forecasts for the upcoming quarters to prepare for re-forecasting as visibility improves.

Value Proposition

- Modify your value propositions to address customer needs during this period.

Sales Process

- Firm up close-in sales opportunities and determine any necessary adjustments to secure the business.

Incentive Compensation and Quotas

- Address the sales team's financial concerns with clear messaging and building trust while you were getting further visibility.
- Form a compensation advisory team focused on actions related to this crisis.

Talent and Development

- Connect with the sales team at the start of the crisis with a clear leadership message about the plan ahead, even if short-term.
- Provide close support to the sales team with intentional interactions.

Phase 2. Planful Action. During Planful Action, companies began implementing approaches such as improvements to the value proposition and adjustments to sales processes. These are measures you organization should consider, by discipline, during Planful Action:

Voice of the Customer

- Create a customer communications and feedback campaign that considers key audiences, evolving messaging, proof sources, modes, and calendar.

Business Performance Planning

- Provide guidance on forecasted performance for the next quarters based on increased visibility.

Products & Services

- Make rapid adjustments to your products and services to best meet customer needs during the crisis.

Value Proposition

- Form a customer ideation team to create overall strategies to help customers.
- Implement special offers, pricing, or policies related to this crisis.

Sales Process

- Focus the sales team on building pipeline beyond the curve and measuring milestones, which may be linked to compensation.
- Work on rapid strategic account planning to determine how to help customers according to their specific situations and provide longer-term value.

Incentive Compensation and Quotas

- Develop and communicate the first wave of compensation actions that may include milestone bonuses, lower thresholds, and goal shifts to future quarters.

Talent and Development

- Create an employee communications and feedback campaign that considers key audiences, evolving messaging, proof sources, modes, and calendar.
- Work with the team and coaching according to a plan.

Phase 3. Building and Adjusting. During Building and Adjusting, companies are developing and implementing structures such as revised segmentation, rapid account planning, and partnerships with complementary organizations. Examine these steps, by discipline, during Building and Adjusting:

Voice of the Customer

- Further develop the customer communications campaign messaging based on the evolving environment, a better understanding of customer needs, and your updated plan.

Business Performance Planning

- Assess your performance-to-date and re-forecasting sales for the next quarters based on increased visibility.

Products & Services

- Modify or develop products and services that best address customer and market needs during the crisis.

Segmentation and Targeting

- Identify the segments or industries that provide the greatest opportunity for growth and those that you can help with their challenges in the current environment.

Value Proposition

- Revise or refine your value propositions to customers at the company level and the sales front line.

Sales Channels

- Actively partner with complementary organizations to combine your capabilities to improve your approach to market and better meet customer needs.

Sales Process

- Execute your rapid strategic account plans and work directly with customers to get insight, propose ideas, and refine approaches.

Sales Deployment

- Assess territory and account assignments to heat map opportunities and re-assign accounts to sales resources for optimal coverage.

Incentive Compensation and Quotas

- Continue to evaluate compensation actions and consider further action with increased visibility that may include goal adjustments for the year and core plan changes.

Talent and Development

- Further develop the employee communications campaign messaging based on the evolving environment, a better understanding of your opportunities, and your updated actions on enabling the organization.

Phase 4. Planning for Recovery. Planning and Recovery involves the big brain thinking on how customer needs and sales in your industry will change after the crisis and how you'll adjust or build a new go-to-market strategy to be competitive in the next economy. Evaluate these areas, by discipline, during Planning for Recovery:

Voice of the Customer

- Gain insight from your customers about how their needs may evolve post-COVID-19 and how you can assist them with their recovery. Use that information to inform your offer development and your sales model.
- Assess the market broadly to look for trends that indicate how you might further develop your offers and sales model for post-COVID-19 recovery.

Business Performance Planning

- Estimate opportunity and business performance for the end of the year and into next year with assumptions on your recovery offers.

Products & Services

- Modify or develop products and services that best address customer and market needs for the post-crisis recovery.

Segmentation and Targeting

- Identify the segments or industries that you can best serve with your recovery offers.

Value Proposition

- Develop your value propositions for post-crisis recovery to address the needs of customers who are resuming business or rebuilding.

Sales Channels

- Work with your traditional partners and new partners with complementary business models to plan for recovery offers, marketing, and sales models.

Sales Process

- Evaluate how what you have learned about virtual selling during the crisis can be applied to further developing and improving your post-crisis recovery sales model.

Incentive Compensation and Quotas

- Plan ahead for post-recovery incentive compensation that aligns with your potential changes in sales strategy and sales model.

Talent and Development

- Incorporate new learning about the sales model and sales process into how you coach the sales team for success during the recovery.

Evaluate how your organization is performing in each phase by taking the [COVID-19 Sales Recovery Assessment](#). It will pinpoint specific disciplines in which you can take action by phase. After Planning for Recovery, the most important phase of all will follow... Developing Your Post-COVID Sales Model. Your future sales model will be specific to your company and the customers you serve and will be driven by the market, social, and economic factors that affect it.

[Connect with us at SalesGlobe](#) to learn more about the Post-COVID Sales Model factors that will impact your business and how you can retool or reinvent your go-to-market plan to build the optimal customer experience and sales economics for your business.

Mark Donnolo is managing partner with SalesGlobe. Michelle Seger is a partner with SalesGlobe. For insight and ideation around this challenge, contact us at mdonnolo@salesglobe.com or mseger@salesglobe.com.