

What Are the Benefits?

The MPMP program enhances the basic benefits of the PMP program by:

- Reinforcing PMP within the sales organization
- Speeding implementation of PMP
- Improving Portfolio Plans and Portfolio Maps, which means increased revenue from portfolios of accounts
- Allocating resources efficiently
- Aligning field plans with corporate sales strategy
- Improving management processes, such as measurement and forecasting

Who uses the Managing PMP Program?

Managing PMP is used by leading companies in a variety of industries: high technology, telecommunications, health care, transportation, distribution, utilities, and others. Any company relying on portfolios of accounts for a significant share of their revenue will find this methodology useful for leveraging their current resource investment and growing revenue.

Who Should Attend?

The Managing PMP program is designed for sales managers in organizations that have started implementing the PMP methodology. Participants should be experienced sales managers who have mastered basic management skills, and who have previously attended the PMP program with their salespeople.

What Does the Managing PMP Program Consist of?

Length: One day

Format: We tailor each program for each client's specific industry and corporate culture. The programs are held at the client's site and led by a certified instructor with work experience in the client's industry. All program activities use actual portfolio plans brought to the workshop and incorporate the experiences of the attending managers.

Pre-Course Work: Managing PMP uses real-world portfolio plans to facilitate the implementation process. Attending managers prepare for the workshop by selecting and studying one or two of their portfolio managers'/teams' actual portfolio plans, which they then bring with them.

Agenda: The Managing PMP program consists of five modules:

- The Critical Success Factors identified in a Managing PMP program are the driving force behind management's priorities. By discussing the PMP implementation early, managers get a clear set of guidelines that help them determine where they should spend their time and energy. They see how vital their involvement is to improving performance and achieving business results.
- "A" Account Selection and Analysis shows sales managers how to assess the accounts in a portfolio to assure objective segmentation and "A" Account selection. Further, managers see how to analyze and identify the potential business in "A" Accounts, looking for optimal ways to apply resources and balance account coverage and penetration. The manager uses strategic business thinking and their own experience to focus their salespeople on delivering business value and creating competitive differentiation.
- Portfolio Plan Assessment teaches sales managers a process for reviewing and improving a portfolio manager's/team's planning effectiveness. Repeatable methods and tools for measuring progress allow the manager to assess the quality of content in a portfolio plan and use the results to help their people discover the strengths and vulnerabilities of their plans. Using proven plan review techniques, the manager can effectively lead, coach, and develop their portfolio managers/teams, resulting in improved account relationships and revenue growth.

- Portfolio Plan Leverage provides sales managers with techniques and tools to help the portfolio managers'/teams' leverage the investment they've made in portfolio and "A" Account planning. Practical approaches combined with the managers' own experiences in internal selling ensure the plan gains support from key stakeholders. Managers are given proven communication techniques that help guide the account teams as they prepare to share their plan for delivering business value with their "A" Accounts. Customer Plan Sharing creates a unique interaction with customers that focuses on business priorities and leads to deeper customer relationships, as well as further competitive differentiation.
- Field Implementation focuses on the managers' own practices as they lead, coach, communicate, and measure the PMP implementation process. We provide them with a Management Guide detailing their step-by-step responsibilities and how they link with Critical Success Factors. We discuss best practices as the group taps into years of management experience in the room. Each manager receives a template, which they will use to create a personalized PMP Management Plan. A discussion of the managers' personal Critical Success Factors completes the workshop.

Tools: Managing PMP provides proven management tools for use in the field, including:

- Forms and measurement tools managers can tailor for their own use
- A PMP Management Plan template that gives managers the ability to create a personalized management plan for tracking and measuring the progress of their portfolio managers/teams.

Managing Portfolio Management Process

Version 7.0

What Are the Results?

Managing PMP covers the vital aspects of managing portfolio managers/teams that use PMP. After completing the program, managers have the skills and tools to:

- Ensure account teams have correctly segmented, selected and prioritized the “right” accounts and “right” units within “A” Accounts
- Lead their people through an analysis that identifies their “A” Account customer’s critical business needs and the resulting potential opportunities
- Objectively assess the quality of the content in a Portfolio Plan and Portfolio Map, and then make solid recommendations that help teams overcome vulnerabilities in their plans
- Conduct field plan reviews that meet organizational needs and business demands
- Guide a portfolio manager/team through internal plan reviews that identify and justify needed resources
- Coach a portfolio manager/team in preparing and conducting effective “A” Account Customer Plan Sharing meetings
- Track and measure Portfolio Plan progress and provide feedback for team improvement
- Improve their own ability to manage across multiple portfolios.

Business Issue

Any salesperson charged with the responsibility of managing a portfolio of accounts faces the following issues:

- Account retention and development
- Strategic account development
- Resource allocation

With a finite level of sales, marketing, and consulting resources available, your portfolio managers must direct their efforts toward ensuring they achieve revenue targets, while utilizing and leveraging their resources to develop strategic accounts and protect established account relationships against competition.

The managing component of PMP is a one-day training program for sales managers, who are critical in ensuring the process is integrated and embedded in an organization. The program provides them with the skills and tools to improve the performance of portfolio managers/teams implementing and using PMP.

What is the Managing PMP Program?

The Managing Portfolio Management Process program is one component in OnTarget’s Portfolio Management Process (PMP) solution.

PMP is a structured methodology sales professionals can use to cover, penetrate, retain and grow a portfolio of accounts in a “direct sales” business model. OnTarget implements the methodology using a multi-stage change management approach that consists of several components: consulting services, software tools, and training programs, including the Managing PMP program. This approach fully integrates and embeds the PMP process into your sales and marketing organizations, ensuring the methodology delivers the maximum return on your investment.