*A picture containing clipart

Description automatically generatedReplace the logo with yours*

Company Name

Company Address

Date of Plan Adoption

*Replace all grayed-out example text with text that fits within the section based on your company.*

Mission and Objectives

Company Mission Statement

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| *This is a formal statement describing your company's big vision – what it plans to achieve in the long run. An example of a good mission statement is: Our mission at xyz digital is to provide cutting edge digital marketing solutions to startups operating in healthcare niche.* |

Sales Objectives

The sales objectives outlined below are goals supporting the company’s growth a year from now, as well as years in the future, in terms of increasing revenue, market share, or profit margin.

*Enter your immediate sales objectives. Use SMART approach to define your sales objectives. They should be specific, measurable, achievable, relevant, and timed.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Year 1 Sales Objectives** | | | |
| **Objective** | | **How Objective Will Be Measured** | **Audit Frequency** |
| **1** | ***Example: Grow revenue from refurbished mobile sales by 20% within one year of launching the new plans.*** | *Example: Year-to-date comparison against previous year’s Sales Report* | *Example: Monthly* |
| **2** |  |  |  |
| **3** |  |  |  |

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*Ask yourself: What do you want your business to look like at the end of three years? Enter sales objectives that are more challenging than your Year 1 objectives, but are also realistic for your business. Objectives should be specific, measurable, achievable, relevant, and timed.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Year 3 Sales Objectives** | | | |
| **Objective** | | **How Objective Will Be Measured** | **Audit Frequency** |
| **1** | ***Example: Launch the refurbished mobiles business in India and Japan after 3 years of launch.*** | *Example: Customer map* | *Example: Yearly* |
| **2** |  |  |  |
| **3** |  |  |  |

*Ask yourself: What do you want your business to look like at the end of five years? Enter sales objectives that are more challenging than your Year 3 objectives, but are also realistic for your business. Objectives should be specific, measurable, achievable, relevant, and timed.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Year 5 Sales Objectives** | | | |
| **Objective** | | **How Objective Will Be Measured** | **Audit Frequency** |
| **1** | ***Example: Get year-on-year sales of more than $2M within five years of launch.*** | *Example: Sales Report* | *Example: Yearly* |
| **2** |  |  |  |
| **3** |  |  |  |

Customer Profile

Customer-specific details like the persona, demographics, sales territory, etc. This profile will be used to better identify prospects and prioritize future sales efforts.

*Delete this table if you are using a B2C sales model. Otherwise, fill in the table with the relevant job titles you will be targeting in your sales efforts. Describe the key responsibilities a person with this title might have, where you might network with them, and what channels you will use to identify them.*

|  |  |
| --- | --- |
| **Ideal Customer Profile: B2B Sales** | |
| Relevant Job Titles |  |
| Key Responsibilities |  |
| Memberships and Clubs | *Example: Entrepreneurs’ weekend club* |
| Available Sales Channels | *Example: Phone, email, LinkedIn, Twitter* |

|  |  |
| --- | --- |
| **Ideal Customer Organization Profile: B2B Sales** | |
| Company Size by Annual Revenue |  |
| Company Size by Number of Employees |  |
| Relevant Industries | *Example: Professional services* |

*Delete this table if you are using a B2B sales model. Otherwise, describe the demographics of your ideal customer as well as where you expect to find him or her.*

|  |  |
| --- | --- |
| **Ideal Customer Profile: B2C Sales** | |
| Gender |  |
| Age |  |
| Family Life |  |
| Homeowner |  |
| Income |  |
| Education |  |
| Interests |  |
| Available Sales Channels | *Example: Phone, email, LinkedIn, Twitter* |

*Describe the geographic area or specific accounts where you intend to conduct sales-related activities. List any exceptions.*

|  |  |
| --- | --- |
| Sales Territory | |
| Geographic Location or Named Accounts | *Example: Texas* |
| Exceptions | *Example: Fort Worth* |

Strategies & Tactics

This section includes competition analysis as well as strategies and tactics that will be used to acquire new business opportunities as well as growing business with existing customers.

|  |  |  |  |
| --- | --- | --- | --- |
| **Competition Analysis** | | | |
| **Company** | | **What Makes It Unique?** | **Special Offers to attract more Customers?** |
| **1** | ***Example: Abc Ltd.*** | *Example: High exchange prices for old phones.* | *Example: Special offers for customers who buy new phones from the them.* |
| **2** |  |  |  |
| **3** |  |  |  |

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*List the strategies that will be used to accomplish your sales objectives with regards to gaining new customers. Identify at least two tasks that will be performed by members of the sales team on a daily or weekly basis in support of each strategy.*

|  |  |
| --- | --- |
| **New Business Acquisition** | |
| **Strategy** | **Supporting Tactics** |
| ***Example: Exceed sales quota*** | *Example: Send no less than xx letters of introduction to new prospects each week* |
|  |
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*List the strategies that will be used to accomplish your sales objectives with regards to growing revenue with existing customers or customer accounts. Identify at least two tasks that will be performed by members of the sales team on a daily or weekly basis in support of each strategy.*

|  |  |
| --- | --- |
| **Existing Business Growth** | |
| **Strategy** | **Supporting Tactics** |
| ***Example: Create a touch point program*** | *Example: Contact each of my existing customers no less than once per month with a new idea they cannot get from anyone else* |
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*Fill out the table below, including the summary of each role’s responsibilities, the members of your team assigned to each role, and the KPIs they will be assessed on. KPIs are the key performance indicators, or numbers that will be used to measure the success of individual contributors within a team.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Summary of Responsibilities** | **Team Members** | **KPI** |
| ***Example: Account Manager*** | *Example: Sets customer strategy* |  | *Example: Existing account revenue growth* |
| ***Example: Sales Coordinator*** | *Example: Issues quotations on behalf of account manager* |  | *Example: Time from when a quote is requested to when it is sent* |
| ***Example: Telemarketer*** | *Example: Lead acquisition campaigns* |  | *Example: Number of calls made* |
| ***Example: Marketing*** | *Example: Website enablement and sales collateral development* |  | *Example: Number of leads resulting for online sources* |

Sales Tools & Systems

The approved tools, software, and resources that will be used and how often will the progress be measured (review schedule).

*Progress reports are the tools you intend to use to track company and individual performance. Fill in the table below with the reports you plan to use. Describe how the report will be generated and where it will be stored. Include how often the report will be used to review progress.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Software Used** | **Progress Reports** | **Where to Find the Report** | **Review Schedule** |
| ***Example: Hubspot*** | ***Example: Sales Report*** | *Link to the report (www.xyz.com/report)* | *Example: By the 10th business day of each month* |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Plan Metrics

The progress of the sales process and the success of the overall plan will be measured using the following metrics.

*Give each stage in your sales process a name. Define what milestone or tollgate must be completed in order to achieve the next stage in your process. List the reasons an opportunity may not reach the milestone or tollgate for each step in the sales process.*

|  |  |  |
| --- | --- | --- |
| **Pipeline Stages** | | |
| **Pipeline Stage Name** | **Pipeline Stage Tollgates** | **Reasons an Opportunity Might Be Lost or Abandoned** |
| ***Example: Cold emails*** | *Example: Replied email* | *Example: Looking for something else* |
|  |  |  |
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*Define what you would consider a successful conversion metric based on your business.*

|  |  |
| --- | --- |
| **Conversion Rates** | **Value Considered Successful** |
| **Calls to Marketing Qualified Lead** | *Example: One out of every eight calls* |
| **Marketing Lead to Sales Qualified Lead** | *Example: One out of every three presentations* |
| **Sales Qualified Lead to Booked Order (win %)** | *Example: One out of every five proposals sent* |

*Define the maximum length of time each step should take in order to still be considered successful, or net a positive return on overhead investment, for your business.*

|  |  |
| --- | --- |
| Average Length of Time in Sales Cycle | Value Considered Successful |
| **Time to Qualify Marketing Lead** | *Example: 48 hours* |
| **Time to Qualify Sales Lead** | *Example: One week* |
| **Time to Book Order** | *Example: One month* |

Sales Plan Budget

In order to execute this sales plan, the following costs are expected:

*Several items have been itemized below as examples to help you get started. Add additional budget items for expenses that will be incurred in support of your plan. Enter how much you expect to spend for each expense in the first year of your plan’s adoption under the column titled “Estimated Value.” This section of your plan should be revisited each year and updated with the next year’s estimates.*

|  |  |
| --- | --- |
| **Expense** | **Estimated Value** |
| ***Example: Salaries*** |  |
| ***Example: Commissions*** |  |
| ***Example: Travel*** |  |
| ***Example: Telephone*** |  |
| ***Example: CRM*** |  |
| ***Example: Subscription Costs*** |  |
|  |  |
|  |  |