Sales Plan Template

Most Company's have a Business Plan and a Marketing plan, however, a Sales Plan is the greatest tool that an organisation can produce and implement. For without a sales plan, we may not be in a position to create the necessary revenue to keep the business meeting its cash flow objectives.

Below is a template for a Sales Plan, and this easy four step guide will walk you through the process of creating a powerful sale plan. It is suggested that this template be used to summarise the plan, and then a "fully blown final version" is created in hard copy format and circulated throughout the organisation.

Take your time in completing this sales plan, and when completed, implementation of the plan will ensure that you are at least in a position to move forward with your selling strategies.

Regular review of the sales plan is necessary on a regular basis to ensure that the elements of the plan are working.

Should you require any support in writing your plan, then please feel free to contact our office for further information.

George Manolis
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SECTION ONE, is about the expectations of the sales team.

Executive Summary

Company Mission Statement

Company Vision Statement

Report on Current and Expected Business Climate
A narrative on the current business climate as well as the forecast climate over the next two years. Also comment on how the new sales plan will assist the achievement of the plan in the current economic climate.

Revenue Targets, What are the revenue targets, when we will achieve them, who will achieve them, what industries will this revenue come from, and how will we know when we have arrived.

Resources, What resources have been allocated to achieve the sales plan outcomes, what skill level must the sales team have, how many sales team members are dedicated to the sales team, what support will the sales team have, what selling expenses have been allocated to the sales team, what level of CRM is required by the sales team, and what staff resources are required to operate the CRM system.

KPI's What Key performance indicators have been set for the sales team ? These need to be calculated from a reverse plan which has calculated the sales activity required to achieve sales targets. The plan needs to include KPI's such as the number of cold calls made, the amount of Sales Pipeline activity, The Values of Opportunities in the Sales Pipeline, Key Account Management activity, sales achieved, new sales achieved, profits achieved, both as a team and individually broken down into sales team members and areas.

Milestones, Set milestones regarding who will achieve what targets at what time. It could also include what industries will be penetrated by what date, and what profits will be achieved by when. Perhaps even what new markets are created by a certain time frame.

SECTION TWO, is about the implementation of the processes

Suspects, Specify how the team will collect and manage suspects. What industries they will come from and how we will make contact with them, and at what rate we will contact them.

Qualification, How will we qualify the suspects and how we will manage them. Once they are converted to a prospect, how will we choose a particular sales process how will a sales process be attached to the prospect?
How will we manage suspects which do not qualify?

Clients, what is the sales process which we attach to a client, how we write an account plan. What is the loyalty system, and who actions it.
How do we qualify the difference between an Account, Major Account and Key Account, and a Strategic Partner?

Opportunity, how do we create and manage the golden doors of opportunity. What process will we use to ensure that we have correctly qualified opportunity?
We need to use at quantitative method of measuring the reality of an opportunity.

SECTION THREE, is about how we measure the efforts of the sales team

Suspects and Prospects, Put a value on suspects and prospects so they can be measured at any time. This information must be live and available to all sales team members.

Sales Activity, measure sales activity such as number of prospecting phone calls and the success rate, measure success of proposals, measure success of face-to-face prospecting visits with customers.

Sales Processes, need to be established for all forms of sales activity, including the gathering and qualification of suspects, prospects, clients and opportunities. These sales processes should be integrated into the CRM system.

Sales, measure sales and profitability, slice and dice the information in accordance with the KPI's in section one of the sales plan, and make the information available to the sales team.
Measure the value of opportunity which the sales team has created.

Profits, measure profits and establish where the greatest and least return is coming from.

Sales Team Members, measure sales team member's sales and skills and establish if coaching and strengthening of skills is required.

Customer Service, What are the customer service procedures and how does the quality system integrate into the plan ?
The customer service procedures need to be referenced to in the plan.
If the customer service procedures do not exist, then they should be forecast as a milestone to be achieved.

SECTION FOUR

Analyse, the items measured in Section three and adjust the plan to ensure that we arrive at the targets set in Section 1 of the sales plan.

The analysis must be dynamic and a formal process of evaluation in accordance to the plan must be scheduled each quarter, or three-month period.

During the analysis process we should identify the Personal Development needs of the sales team members and implement programs to assist the members achieve the ultimate goals.