



# SALES PLAN TEMPLATE

Goals:

1-Year:

90-Day:

**Priorities:** Based on your Sales Analysis, ROTI and SWOT Analysis, identify 1 - 3 priorities that you need to focus on in order to achieve your 1-year goal.

e.g. Focus on existing customers to grow share of wallet and improve retention.

1.

2.

3.

## Strategies:

State 1 or 2 strategies for each priority, to be implemented during the year.

e.g: *A. Proactively meet with top 20% of accounts to determine growth opportunities.*

*B. Target retention activities in south end of region to mitigate threat from competitor X.*

Priority 1	Strategy A:
	Strategy B:
Priority 2	Strategy A:
	Strategy B:
Priority 2	Strategy A:
	Strategy B:





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## Time Allocation of Priority Tasks

Task		Weight (%)
1	Sales: Proactive Customer Interactions	
2	Customer Service: Reactive meetings to customer requests	
3	Sales Planning and Monitoring	
4	CRM/Quotes/Admin	
5	Networking / Community Involvement	
6	Professional Development	
7	1:1 Coaching Meetings with manager	
		100%

## 30-60-90 Action Plan

Strategy	Activity	Start Date:	End Date:	Assigned to:	Hours Required:	Percent Complete:	Who Can Help:
1A	Identify top 20% accounts.	Oct 1	Oct 5	Todd	3		Alyssa
1A	Meet with 1/3 of top accounts.	Oct 6	Oct 31	Todd	20		Alyssa
30-Day Goals							
60-Day Goals							
90-Day Goals							

