#

# **Company Name**

Company Address:

Date of Plan Adoption:

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

# **Mission and Objectives**

Company Mission Statement

*This is a formal statement describing what your business plans to achieve. An example of a good mission statement is “We provide customers with cutting-edge digital marketing solutions with best-in-class technical support at a profit to our shareholders.”*

Sales Objectives

## The sales objectives outlined below are goals that will support the company’s growth through increasing revenue, market share, or profit margins in the next 12 months and years to come.

*Enter your immediate sales objectives. Objectives should be specific, measurable, achievable, relevant, and time-bound, following SMART principles.*

| **1-Year Sales Objectives** |
| --- |
| **Objective** | **How Objective Will Be Measured** | **Audit Frequency** |
| **1** | ***Example:*** *Grow top-line sales revenue by 15% within one year of plan adoption.* | ***Example:*** *Year-to-date comparison against the previous year’s sales report* | ***Example:*** *Monthly* |
| **2** |  |  |  |
| **3** |  |  |  |

***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 time-bound.*

| **3-Year Sales Objectives** |
| --- |
| **Objective** | **How Objective Will Be Measured** | **Audit Frequency** |
| **1** | ***Example:*** *Expand sales presence into Canada and Mexico within three years of plan adoption.* | ***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 time-bound.*

| **5-Year Sales Objectives** |
| --- |
| **Objective** | **How Objective Will Be Measured** | **Audit Frequency** |
| **1** | ***Example:*** *Achieve more than $100M in top-line revenue within five years of plan adoption* | ***Example:*** *Sales Report* | ***Example:*** *Yearly* |
| **2** |  |  |  |
| **3** |  |  |  |

# **Ideal Customer Profile**

## These are the ideal customers’ demographics, buying patterns or creditworthiness, and sales territories. This profile will be used to identify prospects better and prioritize future sales efforts.

*Delete this table if you’re using a B2C sales model. Otherwise, fill in the table with your target customer's relevant job titles and key responsibilities, where you might network with them, and what channels you will use to reach them.*

| **Ideal Customer Profile: B2B Sales** |
| --- |
| Relevant Job Titles |  |
| Key Responsibilities |  |
| Memberships and Clubs | ***Example:*** *Chamber of Commerce* |
| Available Sales Channels | ***Example:*** *Phone, Email, LinkedIn, Twitter* |

*Delete this table if you’re using a B2B sales model. Otherwise, describe the demographics of your ideal customer and where you expect to find them.*

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

*Delete this table if you’re using a B2C sales model. Otherwise, fill in the table below describing the ideal organization of the person you identified in your ideal customer profile.*

| **Ideal Customer Organization Profile: B2B Sales** |
| --- |
| Company Size by Annual Revenue |  |
| Company Size by Number of Employees |  |
| Relevant Industries | ***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:*** *New England States* |
| Exceptions | ***Example:*** *Rhode Island* |

# **Strategies & Tactics**

## These are the longer-term strategies and day-to-day tactics you’ll use to acquire new business opportunities and grow business with existing customers.

*List the strategies that will be used to accomplish your sales objectives and gain new customers. Identify at least two tasks that sales team members will perform daily or weekly in support of each strategy.*

| **New Business Acquisition** |
| --- |
| Strategy | Supporting Tactics |
| ***Example:*** *Exceeds Sales Quota* | ***Example:*** *Send no less than # letters of introduction to new prospects each week* |
|  |
|  |
|  |  |
|  |
|  |
|  |  |
|  |
|  |

*List the strategies you’ll use to accomplish your sales objectives about growing revenue with existing customers or customer accounts. Identify at least two tasks that sales team members will perform daily or weekly in support of each strategy.*

| **Existing Business Growth** |
| --- |
| Strategy | Supporting Tactics |
| ***Example:*** *Create a touchpoint program* | ***Example:*** *Contact each of my existing customers no less than once per month with a new idea they cannot get from anyone else* |
|  |
|  |
|  |  |
|  |
|  |
|  |  |
|  |
|  |

# **Sales Tools & Systems**

## The following systems will be used to ensure the sales process is managed and sales activities are performed using approved tools. Progress reports will measure the plan’s success per the defined schedule.

*Progress reports are the tools you 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.*

| **Progress Reports** | **Where to Find the Report** | **Review Schedule** |
| --- | --- | --- |
| ***Example:*** *Pipeline Report* | ***Example:*** *Pipedrive Pipeline Report* | ***Example:*** *By the 10th business day of each month* |
| ***Example:*** *Sales Report* |  |  |
|  |  |  |
|  |  |  |

*Fill out the table below with the tools you or your sales team will use to manage contacts and communication.*

| **Communication and Contact Management** | **Tool and Description of Intended Use** |
| --- | --- |
| Contact Management | ***Example:*** *Pipedrive CRM* |
| Phone | ***Example:*** *Salespeople will be able to use their preferred device for calls that will be logged with Pipedrive’s mobile app* |
| Email | ***Example:*** *Salespeople will be able to use either Gmail or Pipedrive’s CRM email service* |
| Other | ***Example:*** *Instant Messaging Service* |

*While your sales plan does not have to include a full-featured CRM, contact management software helps streamline the sales process by keeping relevant information about contacts, such as titles, relationship details, and call notes, in a single place. Pipedrive CRM does all that, plus pipeline management, and measures most sales metrics in real time.*

[***Visit Pipedrive***](https://go.performi.com/goto/pipedrive-sales-plan-template)

# **Sales Pipeline**

## The following metrics will measure the sales pipeline's health and the overall plan's success.

*Give each stage in your sales process a name. Define what milestone or tollgate must be completed 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.*

| **Progress Reports** |
| --- |
| Pipeline Stage Name | Pipeline Stage Activities | Reasons an Opportunity Might Be Lost or Abandoned |
| ***Example:*** *Cold Call* | ***Example:*** *Answered Phone Call* | ***Example:*** *Disconnected phone number* |
| ***Example:*** *Warm Lead* | ***Example:*** *Capability brochure sent* | ***Example:*** *Prospect refuses additional information* |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

*Define what you would consider a successful conversion metric based on your business. Learn more about the definitions of conversion rates and other*[***sales metrics***](https://fitsmallbusiness.com/sales-metrics-pipeline-performance/)*.*

| **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 for your business to still be considered successful or net a positive return on overhead investment.*

| **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* |

# **Roles and Responsibilities**

## This section outlines the responsibilities of people who have a role in the success of the overall sales plan, including any separate marketing and/or marketing agency support.

*Fill out the table below, including the summary of each role’s responsibilities, the members of your team assigned to each role, and their key performance indicators (KPIs) or numbers that 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:*** *AIssues quotations on behalf of the 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:****Marketer* | ***Example:*** *Website enablement and sales collateral development* |  | ***Example:*** *Number of leads from online sources* |

# **Budget**

## The following costs are expected to execute this sales plan.

*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 “Estimated Value.” Revisit this section of your plan each year and update it with the next year’s estimates.*

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