***INSTRUCTIONS: Make a copy of this document and customize it wherever you see words or phrases in brackets or parentheses. Do NOT request edit access.***

***Use these templates to guide your sales planning operations.***

Sales Plan Template Examples

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## 1. 30-60-90-Day Plan Template

**Phase 1 (Days 1-30)**

**Objective:** [Define the focus for this phase, e.g., onboarding and learning]

* [Task 1]
* [Task 2]
* [Task 3]
* [Task 4]
* [Task 5]
* [Task 6]
* [Task 7]

**Phase 2 (Days 31-60)**

**Objective:** [Define the focus for this phase, e.g., applying skills and contributing]

* [Task 1]
* [Task 2]
* [Task 3]
* [Task 4]
* [Task 5]
* [Task 6]

**Phase 3 (Days 61-90)**

**Objective:** [Define the focus for this phase, e.g., independent execution and results]

* [Task 1]
* [Task 2]
* [Task 3]
* [Task 4]
* [Task 5]
* [Task 6]

**Expected Outcomes**

* **By Day 30:** [Outcome 1]
* **By Day 60:** [Outcome 2]
* **By Day 90:** [Outcome 3]

## 2. Customer Profile Sales Plan Template

**Objective:** [Define the overarching goal, e.g., "Target and convert ideal customers by aligning sales efforts with their needs."]

**Step 1: Define Ideal Customer Profile (ICP)**

* **Industry:** [e.g., target industries like SaaS, healthcare, etc.]
* **Size:** [e.g., company size or revenue range]
* **Location:** [e.g., geographic focus areas]
* **Pain Points:** [List primary challenges or needs of the ICP]
* **Decision-Maker:** [Identify key decision-makers and influencers]

**Step 2: Targeted Outreach**

* Create prospect lists matching ICP attributes.
* Personalize outreach efforts (e.g., emails, messages) to address specific pain points.
* Use multichannel strategies (e.g., email, social media, calls, direct mail).

**Step 3: Value Proposition**

* Highlight how your product/service solves ICP challenges.
* Tailor messaging to align with decision-maker priorities (e.g., ROI, efficiency).
* Provide measurable benefits and success stories relevant to the ICP.

**Step 4: Goals and Activities**

**Activities:**

* [Activity 1, e.g., conduct discovery calls]
* [Activity 2, e.g., deliver tailored demos]
* [Activity 3, e.g., prepare customized proposals]

**Goals:**

* [Goal 1, e.g., contact X ICP prospects per week]
* [Goal 2, e.g., convert Y% of outreach to demos]
* [Goal 3, e.g., close Z deals per quarter]

**Step 5: Track and Optimize Based on Feedback and Performance**

* **Metrics:** [e.g., lead-to-opportunity conversion, average deal size, sales cycle length]

## 3. New Product or Service Launch Plan Template

**Objective:** [Define the goal, e.g., "Successfully introduce a new product/service to the market and drive adoption."]

**Phase 1 (Weeks X-Y): Preparation**

* Conduct market research to understand the target audience and competitors.
* Define the product’s unique value proposition.
* Set clear launch goals and metrics (e.g., sales targets and adoption rates).
* Develop marketing and sales materials (e.g., brochures, pitch decks, social content).

**Phase 2 (Weeks X-Y): Pre-Launch**

* Train internal teams on product features, value propositions, and messaging.
* Generate awareness with teaser campaigns and partnerships (e.g., influencers, media).
* Engage early adopters for beta testing, collect feedback, and refine the product.

**Phase 3 (Weeks X-Y): Launch**

* Announce the product through press releases, advertising, and events.
* Execute targeted sales campaigns with promotional offers.
* Showcase product demos and share testimonials to build credibility.

**Phase 4 (Weeks X+): Post-Launch**

* Monitor KPIs to evaluate success (e.g., adoption, revenue).
* Use customer feedback to improve the product and refine messaging.
* Maintain momentum with ongoing campaigns, case studies, and product updates.

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## 4. Sales Market Expansion Plan Template

**Objective:** [Define the goal, e.g., "Enter a new geographic market to drive revenue and capture untapped customer segments."]

**Phase 1 (Months X-Y): Market Research**

* Analyze market size, demand, competition, and customer needs.
* Identify target industries and customer segments.
* Define a localized value proposition and set sales goals (e.g., [specific revenue targets]).

**Phase 2 (Months X-Y): Preparation**

* Hire sales representatives or partners with expertise in the target market.
* Localize marketing materials and design targeted campaigns.
* Leverage CRM data to identify leads and seek referrals from existing customers.

**Phase 3 (Months X-Y): Execution**

* Launch personalized outreach efforts (e.g., emails, ads, events).
* Build partnerships with local distributors, influencers, or relevant organizations.
* Secure initial key accounts as proof of concept for the market.

**Phase 4 (Months X-Z): Growth**

* Monitor sales performance and adjust strategies based on data insights.
* Scale efforts by expanding the team and increasing outreach.
* Leverage success stories and case studies to grow credibility and market share.

**Target Market**

* **Region:** [e.g., Western Europe]
* **Industry Focus:** [e.g., Manufacturing]
* **Revenue Goal:** [e.g., $1M revenue in Year X]

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## 5. Marketing Alignment Plan Template

**Objective:** [Define the goal, e.g., "Align marketing and sales efforts to drive lead generation, improve conversions, and meet revenue targets."]

**Phase 1 (Weeks X-Y): Define Shared Goals**

* Align on key objectives (e.g., revenue targets, lead conversion rates, SQL goals).
* Set measurable performance metrics (e.g., lead volume, CAC, ROI).

**Phase 2 (Weeks X-Y): Understand Target Audience**

* Develop unified buyer personas and map the customer journey.
* Identify critical touchpoints and opportunities for marketing and sales collaboration.

**Phase 3 (Weeks X-Y): Develop Aligned Campaigns**

* Create high-impact content assets (e.g., case studies, videos, product demos).
* Collaborate on targeted campaigns (e.g., email marketing, paid ads, webinars).
* Define MQL criteria and establish a streamlined lead handoff process for sales.

**Phase 4 (Weeks X-Y): Implement Communication and Tools**

* Schedule regular marketing-sales sync meetings (e.g., bi-weekly or monthly).
* Integrate CRM and marketing tools to ensure visibility and transparency.
* Establish feedback loops for continuous improvement and alignment.

**Phase 5 (Ongoing): Measure, Optimize, and Scale**

* Monitor KPIs and refine strategies based on data.
* Optimize campaigns to improve lead quality, engagement, and conversions.
* Share success stories and results to maintain alignment and morale across teams.

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## 6. Buyer’s Guide Template

**Product Overview**

* **Product Name:** [e.g., XYZ Smart Thermostat]
* **Category:** [e.g., Home Automation]
* **Availability:** [e.g., Worldwide or specific regions]
* [Provide a brief product description, emphasizing its purpose, key features, and value proposition.]

**Key Features**

* **[Feature 1]:** [Brief description, e.g., Smart Scheduling: Automatically adjusts to preferences.]
* **[Feature 2]:** [Brief description, e.g., Remote Control: Access via mobile app from anywhere.]
* **[Feature 3]:** [Brief description, e.g., Voice Control Compatibility with popular assistants.]
* **[Feature 4]:** [Brief description, e.g., Geofencing: Automatically adjusts when you're near or away.]
* **[Feature 5]:** [Brief description, e.g., Easy Installation: DIY setup with instructions.]

**Benefits**

* **Cost Savings:** [Description of how the product reduces expenses.]
* **Convenience:** [Explain how the product improves ease of use and access.]
* **Comfort:** [Highlight how the product ensures optimal performance or settings.]
* **Environmental Impact:** [Explain its eco-friendly benefits, if applicable.]

**Why Choose [Product Name]?**

* **[Point 1]:** [Highlight unique technology, design, or feature.]
* **[Point 2]:** [Emphasize seamless integration or compatibility.]
* **[Point 3]:** [Customer support or extended warranty options.]

**Customer Testimonials**

*"[Quote from a satisfied customer.]"*

**—** [Name], [Customer type, e.g., Homeowner, Business Owner]

**Pricing and Availability**

* **Retail Price:** [e.g., $149.99]
* **Special Offer:** [e.g., discounts, promotions for new customers.]
* **Availability:** [e.g., online store, major retailers.]

**Next Steps**

* Visit our website for more details and product specifications.
* Contact our team for personalized demos or installation support.
* Purchase securely online or find a retailer near you.