

**Sales Plan Template**

W

**Company Name**



**Main Contents of This Plan**

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boarder1.png

Company Name

Address Line 1

Address Line 2

<<Company Phone>> <<Fax>>

Email Address

Company Website

boarder1.png

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**Sales Plan Template**

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| **Previous Period** | |
| Revenue | Exactly how much you generated. Don’t forget credit notes, bad debts and deferred payments |
| Unit sales by product type | Which products sell best? Are they continuing to grow? |
| No of customers | Do the 80:20 rules apply? How reliant are you on a small number of customers? |
| Average order value | Is this changing? |
| Geographic breakdown | A breakdown by sales territory. Which territories generate most/least? |
| Revenue by month/quarter | Are there trends, when are the weak strong periods |
| New business revenue | What proportion of business is new? |
| Renewal and existing business | What is your retention/renewal rate? Is this increasing/decreasing? How much “churn” |

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| **Market Analysis** | |
| Customer groups by industries | Who and where are your customers? |
| Market size | Is the market growing |
| Market Share | Best broken down by product. Which products are Stars, Cash Cows, and Dogs? |
| Changes in the market now? Future trends? | What trends can you foresee? |
| What factors are influencing growth or decline in your industry? | What Political, Economic, Social and Technological factors are impacting on your industry? |

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| **Competitor Analysis** | |
| Market players/competition. |  |
| Competitive advantages of current players. |  |
| Strengths, Weaknesses, Opportunities and Threats |  |
| Statement of overall competitive position |  |

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| **Sales Goals Revenue** | |
| Revenue goals | Break this down by month/quarter and express as % change |
| Revenue by product type | Break this down by month/quarter and express as % change |
| Revenue by customer type | Break this down by month/quarter and express as % change |
| Revenue by territory | Break this down by month/quarter and express as % change |
| Existing clients | Break this down by month/quarter and express as % change |
| New business | Break this down by month/quarter and express as % change |

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| **Sales Goals** | |
| Market share goals | Express as overall market share required and as % change |
| Unit sales by product type | Number and % change |
| No of new customers | Number and % change |
| No of new customers | Number and % change |

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| **Overall Sales Positioning Plan** | |
| New business acquisition strategies | Overall strategy. Try to express it in one or two sentences. “New business growth will come from two principle areas: China and sales of product X in the semiconductor industry” |
| New business acquisition tactics | Specific new business activities. For example lead acquisition, contact targets, sales promotion etc |
| Existing business growth strategies | Again express this in a sentence or two. “Existing business growth will be achieved by selling enhanced customized services as part of the renewal program.” |
| Existing business growth tactics | Timings, activities, sales promotion etc. |
| Statement of overall competitive strategy | How will you position yourself versus your competitors? |
| Pricing strategies | Low cost/high volume? Increase yield per customer? Etc. |

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| **Sales Activity Plan** | |
| Milestones | Key dates in your calendar. It is probably best to align this with the trends in sales. |
| Trade Shows | Which shows , when, objectives for each event |
| Key sales events | Sales meetings, marketing meetings etc |
| Key sales activities | When will literature be produced, other marketing activities, sales promotion activities |

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| **Territory** | **Total** | **Month** | | | | | | | | | | | |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** |
| **1** |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **2** |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **3** |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **4** |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **5** |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **6** |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **7** |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **8** |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| **Resources and Staffing** | |
| Staff requirements | This can be calculated by forecasting the total number of sales contacts you require to meet your target and dividing this by the average contact rate for each salesperson. |
| Competencies | How well equipped is your team to sell this way? What needs to be changed or improved? |
| Other resource requirements | Training, literature, temporary help etc. |
| Briefing and communicating | How do you plan to communicate the plan |
| Monitoring | When and how will you monitor activities and results |
| Feedback | What other mechanisms are there to assess progress? |

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