

Sales Plan Template

A sales plan defines and documents the analysis and objectives that inform your organisation’s sales activities. Like any plan it is a living document that should be reviewed and adapted to meet changing circumstances.

A key purpose of the template is to encourage you to analyse your current situation and match this analysis with your sales goals. This process will help ensure that the major sales activities are included in your sales plan.

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	Does the 80:20 rule 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"

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?

Competitor Analysis	
Market players/competition.	Estimated market shares
Competitive advantages of current players.	Any weaknesses? Any sales advantages?
Strengths, Weaknesses, Opportunities and Threats	A SWOT overview of your position
Statement of overall competitive position	Two or three sentences outlining your position.

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

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

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 customised services as part of the renewal programme."
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.

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

Territor y	Total	Month											
		1	2	3	4	5	6	7	8	9	10	11	12
1													
2													
3													
4													

5														
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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?