

# Sales Plan template

This template will help you to lay out a clear plan for your sales strategy and encourage you to think about how you will achieve your sales goals. You'll identify your revenue targets, your audience, and the activities you need to do to achieve those sales goals.

**Use the instructions and example of a completed Sales Plan on the first 4 pages of this template to develop an understanding of how to complete a Sales Plan. Then use the empty template on the final page to build your own Sales Plan. Share this plan with the team in charge of selling your product/service. This may be people within your organisation or your partner's sales team.**

## STRATEGIC GROWTH INTENT

Before you start on your sales targets, think about why you are aiming to achieve the targets you are setting. What is your ultimate goal for the period? (E.g. is it to launch your product into your new target market? If so, your revenue targets may be lower than normal, but your leading activities may increase while you focus on building the new opportunity).

**EXAMPLE:** Sales growth through introduction of a new target market (growing into the New South Wales market) and increase sales with existing accounts.

## SALES GOALS

Here, think about your revenue targets. Look at your overall revenue target and the expected composition of your sales - existing sales and new business. Think about your export plans and your strategic growth intent. How much of this revenue are you expecting to come from export sales at different periods?

You should think about your long-term revenue goals (e.g. 3 years) and your goals for the next year. Once you've landed the year's goals, break that down into what it looks like per quarter and per month (e.g. if you're aiming to make \$100,000 over a 12-month period, this will be \$25,000 per quarter and \$8,333 per month); what revenue do you expect to make in each of those periods?

You may wish to break your sales goals down by sales person, channel partner or perhaps geography.

SALES GOALS	3 YEARS	1 YEAR	THIS QUARTER	THIS MONTH
<b>Targeted sales goals (Total revenue)</b>	<b>\$10M</b>	<b>\$3M</b>	<b>\$750,000</b>	<b>\$250,000</b>
<b>Existing business</b>	<b>\$3M</b>	<b>\$1M</b>	<b>\$250,000</b>	<b>\$83,333</b>
Recurring revenue	\$2M	\$666,667	\$166,667	\$62,500
Other BAU	\$1M	\$333,333	\$83,333	\$20,833
<b>New business (Total revenue less total existing business)</b>	<b>\$7M</b>	<b>\$2M</b>	<b>\$500,000</b>	<b>\$166,667</b>
New domestic revenue	\$4M	\$1.2M	\$300,000	\$100,000
New export revenue	\$3M	\$800,000	\$200,000	\$66,667

## LEADING ACTIVITY

Once you have an idea of your sales goals, think about the key activities you (and possibly your sales team) will need to do to meet those targets. Think about both your domestic and your export business – what will the split be in your leading activities?

Taking into account your sales goals for the one-year period, break down the activities that will help you achieve these goals and the time you/your team will need to spend to get the results you are aiming for.

Some of the activities may not be relevant to your business – use this as it works for you. If you are a B2C company you might consider the activities from the point of view of the agent or distributor you are using. How many deals do you expect your distributor to close (e.g. how many stores would they get your product into over the 12-month period?)

You can use your current domestic business as a basis for the amount of time and number of proposals you'll require for your export business.

ACTIVITY	12 MONTHS	WEEKLY	MONTHLY	ACTUAL WEEKLY <i>Add this figure based on the actual number of deals/proposals/account management calls your team makes per week</i>
<b>Total deals required</b> <i>How many deals do you need to sign to meet your new business revenue targets?</i>	480	10	40	
Domestic	288	6	24	
Export	192	4	16	
<b>Proposals presented</b> <i>What's the conversion rate of a proposal being presented to a potential customer, to a deal being signed? How many proposals will you need to present to potential customers to meet your 'deals required' target?</i>	960	20	80	
Domestic	576	12	48	
Export	384	8	32	
<b>Account management reviews/calls</b> <i>How many current accounts are you managing? And how many calls will you need to make to maintain these accounts? Maintaining your current accounts is important work that takes time. Factor this into your sales activities.</i>	1920	40	160	

## YOUR AUDIENCE & MESSAGING

In this section, think about who you are selling to and who the leading activities you have identified should be aimed at.

Refer back to the Value Proposition lesson and the Buyer Personas you have created. Use three or so of these personas to build a plan for how you will address these different personas' problems. **PERSONA ONE below is an example.**

	PERSONA ONE	PERSONA TWO	PERSONA THREE
<b>Target market segment</b> <i>Who is the target consumer/sector/industry?</i>	Service & testing for local small businesses		
<b>Target audience</b> <i>Who within the company (or directly) are you speaking to? (E.g. the decision marker or an influencer)</i>	Owner, Chief Operating Officer, Health & Safety Officer		
<b>Problems we solve</b> <i>What problem is the customer trying to solve that your product/service can help them with?</i>	Compliance issues, Health & Safety liability & fines, downtime issues		
<b>Gains we provide</b> <i>Based on the problem you are solving, what gains are you therefore providing for that target customer?</i>	Productivity by cutting downtime		
<b>Strategic messaging</b> <i>Positioning statement – what's the statement you can make to explain who you sell to and why. It is a build on your value proposition. You can format this as: "We help... [emotional cue]... business problem". For example: "We help operations managers in mining companies who are frustrated with inefficient loading resulting in time wasted and unnecessary extra mileage travelled to shift a load."</i>	"We work with company owners/COOs who are concerned about rising compliance costs with new Health & Safety laws."		
<b>Value proposition</b> <i>Thinking about your value proposition. How might it differ slightly by the audience and market segment you are speaking to?</i>	"Working with them, we've been able to reduce these costs by between \$150K & \$200K within the first year. We helped a company in New Zealand in a very similar industry to yours to reduce their compliance costs by over 60%."		

## STRATEGIC GROWTH INTENT

## SALES GOALS

SALES GOALS	3 YEARS	1 YEAR	THIS QUARTER	THIS MONTH
<b>Targeted sales goals (Total revenue)</b>				
<b>Existing business</b>				
Recurring revenue				
Other BAU				
<b>New business (Total revenue less total existing business)</b>				
New domestic revenue				
New export revenue				

## LEADING ACTIVITY

\* Add this figure based on the actual number of deals/proposals/account management calls your team makes per week

ACTIVITY	12 MONTHS	WEEKLY	MONTHLY	ACTUAL WEEKLY*
<b>Total deals required</b> <i>How many deals do you need to sign?</i>				
Domestic				
Export				
<b>Proposals presented</b> <i>What's the conversion rate of a proposal being presented to a customer, to a deal being signed?</i>				
Domestic				
Export				
<b>Account management reviews/calls</b> <i>How many calls will you need to make to maintain/review your current accounts?</i>				

## YOUR AUDIENCE & MESSAGING

	PERSONA ONE	PERSONA TWO	PERSONA THREE
<b>Target market segment</b> <i>Who is the target consumer/sector/industry?</i>			
<b>Target audience</b> <i>Who within the company (or directly) are you speaking to? (E.g. the decision maker or an influencer)</i>			
<b>Problems we solve</b> <i>What problem is the customer trying to solve that your product/service can help them with?</i>			
<b>Gains we provide</b> <i>What gains is your solution providing for that target customer?</i>			
<b>Strategic messaging</b> <i>Positioning statement – what statement can you make to explain who you sell to and why?</i>			
<b>Value proposition</b> <i>How might this differ depending on the audience and market segment you are speaking to?</i>			