

**[Company Name]**

**Sales Plan**

**For**

**[Timeframe]**

**Written by: [Name, Position]**

Contents

[Business Summary 4](#_Toc17463156)

[Our Company 4](#_Toc17463157)

[Our Mission Statement 4](#_Toc17463158)

[Our Vision Statement 4](#_Toc17463159)

[Sales Team 5](#_Toc17463160)

[Leadership 5](#_Toc17463161)

[Team Structure 5](#_Toc17463162)

[Target Market 6](#_Toc17463163)

[Location 6](#_Toc17463164)

[Industries 6](#_Toc17463165)

[Buyer Personas 6](#_Toc17463166)

[Positioning 7](#_Toc17463167)

[SWOT Analysis 7](#_Toc17463168)

[Competitor Analysis 7](#_Toc17463169)

[Competitive Advantage 8](#_Toc17463170)

[Pricing Strategy 8](#_Toc17463171)

[Sales Resources 9](#_Toc17463172)

[Software 9](#_Toc17463173)

[Other Tools 9](#_Toc17463174)

[Sales Strategy 10](#_Toc17463175)

[Qualification Criteria 10](#_Toc17463176)

[Inbound Strategy 10](#_Toc17463177)

[Outbound Strategy 10](#_Toc17463178)

[Budget 11](#_Toc17463179)

[Sales Goals 12](#_Toc17463180)

[Revenue 12](#_Toc17463181)

[Deals 12](#_Toc17463182)

[Units Sold 12](#_Toc17463183)

[Other Sales Metrics 12](#_Toc17463184)

[Action Plan 13](#_Toc17463185)

[Action Plan - Review 15](#_Toc17463186)

## Business Summary

### Our Company

[Outline where your company is based (location of HQ, other main offices), all the different products and services your company offers, and how long it has been running.]

### Our Mission Statement

[This section should contain your company’s mission statement.]

### Our Vision Statement

[This section should contain your company’s vision statement.]

## Sales Team

[In this section, you will describe your sales department and its structure.]

### Leadership

[List the leaders of the sales teams, their titles, and primary responsibilities.]

### Team Structure

[Explain how your sales department is structured, e.g., by adding an organizational chart. In addition to current team members, it might be a good idea also to add any positions you are looking to fill or new hires you are onboarding.]

## Target Market

[It’s vital to identify your target market. Ask yourself the following questions: Who can benefit from my product or service? Who are my key prospects? Which region and industry do I want to target? Who should be excluded from my sales efforts?]

### Location

[Where are your prospects physically located? Which regions do you want to target?]

**[Location 1]**

**[Location 2]**

### Industries

[Name the industries that you’re planning to target with your sales efforts:]

**[Industry 1]**

**[Industry 2]**

### Buyer Personas

[Try to answer the following questions about your target audience:

* Where are they located? How old are they?
* What is their job title?
* What industry do they work in?
* What are their goals or challenges? Pain points? Values?
* What can your product do to help solve their problems?]

**[Buyer Persona 1]**

**[Buyer Persona 2]**

## Positioning

[What is your company's place in your industry? How do you stand out from your competitors?]

### SWOT Analysis

[Analyze the internal and external environment of your company. Identify your organization's strengths and weaknesses and the opportunities and threats to which it is exposed.]

Strengths:

Weaknesses:

Opportunities:

Threats:

### Competitor Analysis

[State which companies you are expecting to compete with, in your target market and list what your strengths and weaknesses are, compared to your competitors and how you can address those weaknesses in a sales negotiation.]

**Competitor One:**

Comparative Strengths:

Comparative Weaknesses:

Counterpoints:

**Competitor Two:**

Comparative Strengths:

Comparative Weaknesses:

Counterpoints:

**Competitor Three:**

Comparative Strengths:

Comparative Weaknesses:

Counterpoints:

### Competitive Advantage

[What is your competitive advantage? Explain what makes your company, product/service unique and comparatively stronger than your competitors.]

### Pricing Strategy

[Lay out your pricing and discount strategy.]

## Sales Resources

[For your team to reach its sales goals, it needs the support of sales software such as a [CRM system](https://www.act.com/en-uk/sales-crm), internal documentation, or other sales tools.]

### Software

[Choose the right CRM software that will help you manage every stage of your sales pipeline. If you need help finding the right software read our free guide [*How to Choose the Best CRM Solution for Your Business*](https://www.act.com/en-uk/guides/best-crm-software). ]

### Other Tools

[List the tools you provide to your salespeople to help them successfully engage the buyer throughout the buying process. These can be a documented sales process, brochures, customer success stories and testimonials, or other sales tools.]

## Sales Strategy

[Describe your sales strategy.]

### Qualification Criteria

[How should your salespeople qualify leads and contact them? List the criteria a prospect needs to meet so that a sales rep reaches out to them.]

Criterion 1:

Criterion 2:

Criterion 3:

Criterion 4:

Criterion 5:

### Inbound Strategy

[Describe your inbound sales strategy, e.g. inbound emails, social selling, events, etc.]

### Outbound Strategy

[Describe your outbound sales strategy, e.g. cold calling.]

## Budget

|  |  |
| --- | --- |
| **Expense** | **Estimated Cost** |
| Base salaries for sales reps |  |
| Commission payments  |  |
| Software & tools |  |
| Training for sales reps |  |
| Discounting |  |
| Travel expenses  |  |
| Events |  |
| Other |  |
| **Total**  |  |

## Sales Goals

[List your sales targets.]

### Revenue

[State your revenue targets for the end of the period.]

### Deals

[State how many deals your team is planning to close by the end of the period.]

### Units Sold

[State how many units your team is planning to sell by the end of the period.]

### Other Sales Metrics

[List any other sales metrics you might be tracking.]

## Action Plan

[Summarize your planned sales tactics in the table below:]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tactic** | **Owner** | **Timing** | **Goal** | **Cost**  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

## Action Plan - Review

[Review your sales tactics at scheduled dates and adjust your strategy if necessary.]

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Tactic** | **Goal** | **1st Review Date** | **Result** | **New Goal**  | **2nd Review Date** | **End Result** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |



**Need help hitting your sales targets?**

Try Act! CRM free for 14 days to explore how its key features can help you put your sales plan into action and hit your targets.

[Get started now](https://my.act.com/en-gb/trial).

