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| **Hi There!**  Thanks for downloading this template    You Can Edit Version To Fit Your Needs. |
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| This template is to help you create an outline for your company’s sales strategy. It includes sections common to a company’s sales plan and ideas for company’s tactics and information. Simply erase the instructions under each header and replace them with information relevant to your business.  Once complete, you’ll be able to share this plan with investors, company leaders, the sales team, or with whomever you want to.  Bear in mind that this template has been designed in a way that it can be customized by your company. If you feel there are sections included that you would want to skip, or if you think a section is missing, you are encouraged to make those changes as per your business’s needs. |

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*[Company Logo]*

*[Company Name]*

*Sales Plan: [Period of Time, i.e., Q1 2020, FY 2021]*

*Written by: [Your Name]*

*[Your Email]*

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**Mission and Background**

This section would consist of your mission and vision statement i.e., why your business exists in the first place. What purpose do you wish to fulfill with it, and how would you fulfill that purpose?

**Mission Statement**

*[Enter your company’s mission statement]*

**Vision Statement**

*[Enter your company’s vision statement]*

**Company History/Story**

*[Enter your company’s story and/or history]*

**Team**

*[Include information about the leaders and executives of your sales department, their responsibilities and the structure of the team.]*

**Sales Leadership**

*[ Name the leaders of your sales department alongside their responsibilities.]*

**Sales Team Structure**

*[Include the structure of your sales team by region, hierarchy, etc. If you have a chart of your sales team with any other specific segmentation, you can include that here as well.]*

**New Hires**

*[ Explain the current gaps in your team, how do you plan on filling them, and how do you plan on growing your team.]*

**Target Market**

*Write about who would be the main audience for your product or service or who would need your product. Identify their key attributes, so that you can omit out the segments that do not fit in from your marketing efforts.*

**Locations Targeting**

[Identify *your market segment based on the location, the reason behind picking the specific location and so on.]*

Buyer Personas

*[ Who is your target audience? What are the attributes of your ideal customer? What challenges do they face? How can your product help them in solving their challenges?]*

**Omissions**

*[Here you’ll include who you are not targeting and why. It’s never a good practice to waste your resources and efforts in mass marketing. Hence, knowing whom you should not pursue is also important.]*

**Positioning**

*Describe your position in the industry. This segment should help your reader understand your strengths and weaknesses, your competitive advantages, etc.*

**Market Condition**

*[Write about the general condition of the industry. You can also run a Porter’s five forces analysis to know the same.]*

**Value Prop**

*[What value does your product or service offer that would make someone want to become your customer. Identify the problem to which your product is a solution.]*

**Competitive Advantages**

*[What are your advantages over your competitor’s products? What makes you stand out? Include how your product can do good in this section]*

**Pricing Strategy**

*[What is your pricing strategy and how did you develop it. Did you follow practices like competitive pricing, looking into your target market’s purchasing power, etc.]*

**Competitor Analysis**

*[List your top competitors as well as the following information for each competitor:]*

* **Comparative Strength** – *What are your company’s assets that this competitor does not have?*
* **Comparative Weakness –** *In what areas or attributes do your competitors outperform you?*
* **Counterpoints –** *If a comparative weakness is mentioned in sales negotiations, which counterpoints can be used to address those weaknesses?*

|  |  |  |  |
| --- | --- | --- | --- |
| **Competitor Name** | Comparative Strength(s) | Comparative Weakness(es) | Counterpoint(s) |
| **Competitor A** |  |  |  |
| **Competitor B** |  |  |  |
| **Competitor C** |  |  |  |

**Marketing Strategy**

*Include your company’s marketing strategy here. This is basically an overview of what your marketing activities are meant for and how the strategies would achieve their purpose.*

**Email Marketing**

*[Explain your email marketing strategy in brief.]*

**Blogging and Content Marketing**

*[Briefly explain your blogging and content marketing strategy.]*

**Video Marketing**

*[Briefly explain your video marketing strategy.]*

**Event Marketing**

*[Briefly explain your industry event marketing strategy.]*

**Customer Marketing**

*[Briefly explain your customer marketing and referral strategy.]*

**Direct Mail Marketing**

*[Briefly explain your direct mail marketing strategy.]*

**Social Media Marketing**

*[Briefly explain your social media marketing strategy.]*

**Prospecting Strategy**

Write down the steps that should be taken by your sales team once you get qualified leads.

**Criteria for Outreach**

*[What criteria should a prospect meet before sales reaches out to them? Establish must-have attributes so salespeople only spend time working on specific contacts.]*

**Inbound Prospecting Strategy**

*[Talk about your company’s tactics for connecting with contacts on an inbound level, like following up on inbound emails, meetings at industry events, or social selling.]*

**Outbound Prospecting Strategy**

*[Talk about your company’s tactics for cold calls and emails, if applicable.]*

**Action Plan**

Note down actions the sales team must take to fulfill the company’s goals. How many calls should be made, emails should be sent, how many locations need to be visited, etc.

**Tactic #1**

*[Explain the first tactic and copy/paste this section as needed for more tactics in your action plan.]*

**Goals**

*What are your sales targets? These goals will be updated as you update your sales plan.*

**Revenue Targets**

*[What is your targeted revenue – booked and live – for the end of the period?]*

**Deal Target**

*[How many deals do you intend to close by the end of the period?]*

**Units Sold Target**

*[If applicable, how many units do you want sold by the end of this period? If your business sells multiple products, create a target for each product line.]*

**Other Key Sales Metric(s) Target**

*[If you have any other metrics you are tracking for sales define and outline the expectations here.]*

**Budget**

*Outline the budget for your sales initiatives, including total base salaries, bonus/commission structure, resource and software expenses, discounting, training, travel costs, food, and more.*

*It’s helpful to compare the sales budget with your sales forecast.*

**Would you like to add a new section?**

*Write your additional sections here.*