**Sales Plan**



Plan Developed By: ------------------------------------------------------------------------------------------------------

Research Conducted By: ------------------------------------------------------------------------------------------------

**Company Name:**

**Address:**

**Contact:**

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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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| **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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| 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 principal 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 |  |  |  |  |  |  |  |  |  |  |  |  |  |