Sales Plan

**Strategic Sales Plan Template**

**Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Branch:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Manager:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My personal income goal for this year is $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or $\_\_\_\_\_\_\_\_\_ per mo.

I want to work \_\_\_\_\_\_ hours per week maximum.

I want to take \_\_\_\_\_\_ days vacation this year.

## Personal Production Goals

*My volume and unit production goals for the next 12 months are:*

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Sales Volume Goal** | **No. of Units** | **Commission** |
| **Month 1** |  |  |  |
| **Month 2** |  |  |  |
| **Month 3** |  |  |  |
| **Month 4** |  |  |  |
| **Month 5** |  |  |  |
| **Month 6** |  |  |  |
| **Month 7** |  |  |  |
| **Month 8** |  |  |  |
| **Month 9** |  |  |  |
| **Month 10** |  |  |  |
| **Month 11** |  |  |  |
| **Month 12** |  |  |  |
|  |  |  |  |
| **Totals** |  |  |  |
|  |  |  |  |
| **Averages** |  |  |  |

**What is your Closing Ratio Goal: 20% 30% 40% 50% 60% 70% 80% 90% \_\_\_\_\_% other?**

**(Based on your closing ratio, how many prospects must you see to accomplish your goal? (Ex. 50% closing ratio goal, average number of sales/units per month = 10, means you must talk to 20 prospects per month or 4.6 per week (20 x 12 / 52 weeks))**

*How many prospects must you talk to per week to meet your goal? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*How many prospects must you talk to per month to meet your goal? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

## Business Targets

*Following are my key business targets for referrals/business over the next 12 months. I have also estimated the % of business I expect from each source*

|  |  |
| --- | --- |
| **Targets** | **% of business** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

100%

## Sales and Marketing Plan

*For each business target I have selected, here are the specific sales, marketing and outreach activities I must execute to achieve my monthly unit production goal. I have also noted the frequency (daily, weekly, monthly, etc.) for each activity.*

1. **Target:**

|  |  |
| --- | --- |
| **Activities** | **Frequency**  **(Daily, weekly, monthly, etc)** |
|  |  |
|  |  |
|  |  |
|  |  |
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|  |  |

1. **Target:**

|  |  |
| --- | --- |
| **Activities** | **Frequency**  **(Daily, weekly, monthly, etc)** |
|  |  |
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1. **Target:**

|  |  |
| --- | --- |
| **Activities** | **Frequency**  **(Daily, weekly, monthly, etc)** |
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1. **Target:**

|  |  |
| --- | --- |
| **Activities** | **Frequency**  **(Daily, weekly, monthly, etc)** |
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1. **Target:**

|  |  |
| --- | --- |
| **Activities** | **Frequency**  **(Daily, weekly, monthly, etc)** |
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1. **Target:**

|  |  |
| --- | --- |
| **Activities** | **Frequency**  **(Daily, weekly, monthly, etc)** |
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## Personal Development and Operational

*These are the specific learning, training and personal growth initiatives I have planned over the next 6 months. Also, included may be initiatives for improving my internal business operations and efficiencies:*

|  |  |
| --- | --- |
| **Activities** | **Frequency**  **(Daily, weekly, monthly, etc)** |
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## Rewards for Success

*Upon achieving my production goals at the end of the 12 months, I will reward my success with this personal reward for my hard work:*

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| --- |
| **Rewards** |
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### Keys to Success of Plan

1. **Complete** this Game Plan
2. **Give** it to your Manager/Accountability Partner
3. **Review** this Game Plan every week
4. **Implement** the activities consistently
5. Allow your manager and peers to hold you **accountable**
6. **Celebrate** your success!