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# IDEABRIDGE



The IdeaBridge White Paper Series:  
Sales Plan Template

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## SALES PLAN TEMPLATE

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### Summary

A Sales Plan defines the analysis, planning, implementation, goals and objectives of a company's sales activities. However, many companies will produce a Marketing Plan and neglect to devote adequate resources to establishing a detailed Sales Activity Plan. This template has been designed to help ensure that the major sales activities and functions are included in your planning process.

### Overall Sales Plan and Strategy

- Include quantifiable Growth Objectives, broken down by product, month, sales territory, sales person, etc.
- How will you achieve your sales objectives? What's the big-picture overview of your plan?
- Face-to-face sales presentations/demonstrations.
- Telemarketing (inbound, outbound and customer service response unit)
- Sales Promotion Seminars.
- Trade Show Selling Activities, including projected results.
- Joint Marketing Activities.
- Critical Success Factors that will contribute toward results.
- Other Sales Objectives.

### Customer Retention and Loyalty Programs

- Regular Communication with Customers
- Regular Feedback Sessions
- Loyalty Program for users
- Intensive Care Unit for dissatisfied customers
- Customer surveys
- Other feedback channels to be used

### Sales Force Organization

- How many sales people, managers, division heads? Costs?



## SALES PLAN TEMPLATE

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- Sales force Organization Chart
- Job Descriptions
- Sales Goals:
  - By Product Group
  - By Region
  - By Salesperson
  - By Month
- Sales Compensation and Incentive Plans
- Employee Recognition Programs/Award Programs
- Orientation and Training of Sales Personnel
- Top-Producer Club and Recognition
- Sales reporting structure and monthly sales report templates
- Monthly Sales Call Reports
- Sales force Training programs and annual schedule of training programs

### **Prospect Management and Lead System**

- Customer Relationship Management System to track all prospects, leads, referral sources, etc.
- Developing a system to consistently produce and track qualified leads

### **Sales Activities Timetable**

A detailed schedule listing all sales activities throughout the year. The timetable should summarize all activities by month, should list costs and should have a section to indicate response rate and contrast costs and return on investment.

### **Sales Effectiveness Summary**

- Using the Sales Activities Timetable, review the effectiveness of each activity through the year.
- Record the costs associated with each program and contrast costs to total inquiries, new prospects and new customers.
- Analyze effectiveness of each activity as outlined below.



## SALES PLAN TEMPLATE

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### Create a Tracking System

Managers and salespeople need a *tracking system* that allows them to anticipate and forecast new business levels. That strategy should start with setting sales growth targets that are realistic and based upon your sales people's capacity to book new business.

Develop a system to review to consistently improve each month's results by incrementally improving every element of your selling system. Break down every step of the sales process; analyze it and measure it separately. Here's an example:

Once you are sure that the design of your new business development system is logical and capable of delivering results, begin by analyzing the following steps of your sales process:

- The total number of sales leads;
- The number of referrals provided by your referral networks;
- The average number of appointments made by each salesperson;
- The number of proposals or sales presentations;
- The number of signed proposals;
- The number of closed sales and the average sale size;
- The costs to generate each activity listed above;
- Finally, determine the gross profit of each sale and contrast that with the cost to create the sale, not only the marketing and advertising costs, but the cost of your salespeople, their managerial overhead and of course, the incentive compensation program. Set out to systematically improve on each element, beginning with an increase in the number of bonafide leads.