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A sales plan is a document used to achieve sales goals and develop the strategies needed to achieve them. Typically, this document sets out a plan for income growth and other measures of success. Sales plans consist of goal sections, identifying key customer attributes, and listing the necessary strategies, tools, metrics, and estimated costs. Start with our free sales plan sales template sales plans don't have to be complicated documents. They do, however, require that you take time to think through several aspects of your business. To help, we've created a free downloadable sales plan template that's broken down into seven standard sections. Use this sales plan template as well as the information below to create your own plan based on the needs of your business. Download pattern: PDF Word (en) Google Doc No matter whether you use our template or your own, there are key elements that you should include. Here are seven specific steps you need to create a sales plan: Start by setting out your company's mission statement as well as your sales goals in terms of growth. This section will form the basis of your sales plan and will determine your unique sale offer. As a result, this is critical to the success of your plan as it will guide your future sales efforts. Determine your mission Make sure you have clearly defined your mission statement, which is an official statement describing what your business stands for and what it seeks to achieve. A mission statement should be the basis for all strategic planning and a cornerstone of your sales management practice. An example of a great mission is: We provide customers with advanced digital marketing solutions with best-in-class technical support with profit for our shareholders. Sales goals are to support the company's growth now and in the future and typically include revenue, market share or profit. They relate to your mission by helping you accomplish and make it a reality. By setting these sales goals, you explain what success will look like in clear terms while also letting your team goals rally around. It can be helpful to think about sales goals in terms of the S.M.A.R.T. framework: Start by creating one to three SMART goals for your plan in the first year. SMART goals are useful because they make sure that everything is clear about what the goal entails, how its success will be measured, whether the goal is feasible, how it relates to the mission, and when the goal should be achieved. As sales manager, your plan should list the roles of your sales team, as well as any separate marketing and agency support. To summarize the responsibilities of each role and their expected contribution to the process listing the names of individual members of the group, the group, These Sales Roles Determining their Personal Key Performance Indicators (KPI) Creating clear expectations for performance and providing detailed information on how they will be responsible customer persona is a fictional representation of your target customer. It brings your ideal audience to life with a narrative that describes their pain points, demographics and needs, helping to bring to light the best solution you can offer. For example, if you use the B2B sales model from business to business, consider factors such as relevant positions, key responsibilities, memberships and clubs, and the communication channels they use. On the other hand, if you primarily sell to consumers (B2C), your ideal customer profile will include attributes such as gender, age, family life, homeownership status, income, education, interests, and affordable sales channels. To help you get started, we've created a free template that you can use to create a persona customer: Download our free Customer Persona template to identify customer buying patterns Consider your customers' buying patterns. For example, if you are a business consumer (B2C) swimsuit apparel company, your sales plan will be more aggressive and have higher revenue goals in the warmer months and you want to focus on sales during the fall and winter. For business-to-business sales (B2B), you'll focus on factors such as company size, annual revenue, quarterly budgets, and industry trends. Identify your sales area for both B2B and B2C business, identify the sales areas where you expect to find the perfect customer. This should be a description of the geographic region that you are going to work within and why you believe it will support your sales goals. In this section of the sales plan template, you define long-term strategies and day-to-day tactics that you will use to acquire new business and grow your business with existing customers. These are the tasks your team will use to execute a sales plan and predict future sales. In your sales plan, list strategies for adding new customers or perspectives that match your ideal customer persona. Then identify at least two tasks that sales members will perform on a daily or weekly basis to help them meet their sales quota. Here are three strategies to add new customers that you can use in the sales plan template: Setting clear expectations Make at least 60 cold calls about introducing new prospects each week Make at least 10 face-to-face contacts with new prospects each week Make at least five sales pitch presentations each week Raising awareness about services and Solutions Participation in no less than three professional associations in which my best prospects and clients belong in a year all the exhibitions and conventions that my best prospects and clients attend Buying Buy list these associations and send an email about the introduction of Get referrals from new customers within 30 days of delivering my product or service, I will follow up with each of my new customers to make sure they are satisfied. If they are not satisfied, I will seek to solve this problem so I can return to look for customer referrals at a later date. If they are happy with their purchase, I will ask them to send at least three customer directions. Use this section of the sales plan to summarize the sales tools you'll use to support your team in successfully implementing each of your strategies. This ensures that your sales process is managed and your activities are run using the most effective methods. Three common types of tools that will help you create a sales plan include: Customer Relations Management (CRM) CRM software allows you to manage sales activities in real time, measure performance, access information quickly, and allows you to do updates even when you're away from the office with reliable mobile applications. Some CRMs allow you to structure your sales pipeline into meaningful stages and measure every aspect of your plan as it is implemented, without the need for additional sales reports. A small business CRM can help streamline the sales process by keeping relevant contact information, such as name, relationship details, and call notes in one central location. For example, Freshsales CRM is an easy-to-use but powerful tool that manages all your relevant information and can be accessed through a mobile app when you're on the move. Video conferencing software While some meetings take place in person as our society becomes more digital, video meetings are becoming more convenient, helping your team interact with prospects. There are many available video-conference software options such as Magn, which offers a free version for meetings of up to 40 minutes and has available plans for longer appointments. Planning software planning meetings manually can be a pain when you are working with multiple features. There are programs that can automate the process by eliminating back and forth to find a convenient meeting time. For example, Calendly can automatically connect to your calendar, so the prospects know when you can meet. You send them your personal Calendly link and they can choose the meeting time, then it is automatically put on both your calendars. Once you've set your sales goals, decide how to measure sales performance, monitor the performance of the sales plan and achieve these sales goals. Do this by creating a sales process, identifying critical steps at each stage, and then describing success in terms of conversion rates and resource time or process flow. For example, general metrics that you will measure by monthly or quarterly quarterly Including: Year after year (YOY) income: How are your sales this year at the same time compared to last year's sales? New Business Income: Track your monthly and quarterly income from new accounts. Customized Sales Figures: Monitor the performance of each sales representative by tracking their monthly, quarterly and YOY sales goals. Recurring Income: Track how much income comes from current accounts (loyal customers). Customer Outflow: Monitor how many customers you lose to shoot down on a regular basis. If your outflow increases significantly, you'll know that you need to analyze the causes and create a support campaign. A sales plan may not help you achieve your sales goals if the plan is worth more than your business is expected to receive. By detailing the expected costs, you can measure the expected return on your investment. Not all expenses are repeated, so it's also a great idea to break your budget into one-off expenses as well as running costs. Some examples of major budget items include: Sales team salary commissions and bonuses of subscription service expenses like CRM, video conference software, task management tools, the Internet, and phone subscription buying prospects lists The Bottom Line Travel Spending Having an Effective Sales Plan is an essential component of the sales culture for startups and small businesses. While this sometimes merges into a general business plan, it makes much more sense to break out your sales plan as a standalone document. Whether you're creating your own template or using the sales plan template we've provided, it should be the lifeblood of any small business sales process. Once your sales plan is in place, having a CRM to help you manage it can make all the difference in having your team succeed in reaching new customers. Freshsales will help you stay organized and measure your progress against sales goals. They offer a free forever plan and paid plans starting at \$12 per user per month. 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