

## Sample Sales and Marketing Plan

<b>GOAL</b>	<b>TARGET</b>	<b>STRATEGIES</b>	<b>TACTICS/MESSAGES</b>	<b>CALENDAR</b>	<b>MEASUREMENT</b>
<i>Specific, measureable objectives to be accomplished in a time period.</i>	<i>Specific, reachable segments of people with similar needs or interests, motivations, demographics, locations, etc. How many organizations/people are there in each segment?</i>	<i>Strategies that will attract the specific people or organizations you're trying to reach with a compelling offer that meets their interests/needs.</i>	<i>Tools or channels you'll use to reach your targets. What's unique or special about your product/services/bio/history that will connect with people? Which messages will be persuasive?</i>	<i>Specify which activities you will do daily, weekly, monthly or quarterly to achieve your goals.  What time of day or day of week is most effective for each activity?</i>	<i>How will you track results? How will you compare the effectiveness of each tactic? How will you calculate time/money/# of contacts it takes to attract/retain each customer/client?</i>

<p><b>Sample Goal #1:</b></p> <p>Increase sales between 9:30-11:30am from \$xx in 2013 to \$yy in 2014.</p>	<p>Existing and new customers who are parents of small children.</p> <p>--Live or work in 5 mile radius</p> <p>--Flexible schedules</p> <p>--Looking for social contact</p>	<p>Offer free coffee with \$5+ purchase between 9:30-11:30am</p> <p>Facilitate a knitting group</p> <p>Provide kids play area between 9:30-11:30am</p>	<p>Channels: Reach existing customers via email, blog, social media. Reach potential customers via website and social media, also promote via websites, listservs, publications. Print postcards/flyers.</p> <p>Message: "Family hours, easy parking meet other parents."</p>	<p>Ask customers if you can take photos and tag them on Facebook. Post reminders on Facebook and Twitter before and during the target time period.</p> <p>Create weekly promotion schedule.</p> <p>Distribute postcards or flyers at least once a</p>	<p>Total sales in time period</p> <p>Additional expenses (if any)</p> <p>Total # of customers</p> <p>Average sales per customer</p> <p>Test which times of day/days of week get most engagement</p>
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GOAL	TARGET	STRATEGIES	TACTICS/MESSAGES	CALENDAR	MEASUREMENT
				month.	leading to sales
<p><b>Sample Goal #2:</b> Get at least 10 former clients to hire my company again during 2014.</p>	<p>Local non-profits with annual budgets of at least \$500,000.</p>	<p>Offer a free workshop or training in a related service</p>	<p>Channels: Postcard, email, phone calls, meetings, webinars.</p> <p>Message: Save time and money for your mission by cutting overhead with xyz technique.</p>	<p>Email 2 former clients each week. Follow up by phone the next week. Schedule 1 group workshop or 3 1-on-1 trainings per month. Close at least 1 sale per month.</p>	<p>Total # of former clients contacted per month</p> <p>Total # reached</p> <p>Total # demos</p> <p>Total # new contracts</p> <p>Total monthly sales</p>
<p><b>Sample Goal #3:</b> Attract at least 3 new massage clients per month in 2014.</p>	<p>Professionals who are based in home offices</p> <ul style="list-style-type: none"> <li>--Live or work within 5 miles</li> <li>--Work at computer all day</li> <li>--Suffering from back, neck or shoulder pain</li> <li>--Active on social media</li> </ul>	<p>Partner with a yoga studio to offer discounts to their students.</p> <p>Partner with local coffee shop that attracts self-employed workers to set up station for free 10-minute neck and shoulder massages</p> <p>Offer "2 for 1" discount to current clients who bring in a new client.</p>	<p>Channels: Run Facebook ads targeting home-based professionals in 5 mile radius.</p> <p>Use email marketing to encourage existing clients to refer others.</p> <p>Messages: Are you in pain? Get relief for your back now! We can see you today. (Set aside time for same-day appointments.)</p>	<p>Run Facebook ad campaign at different times of day/days of week to test best responses.</p> <p>Email a different segment of your list each week with customized messages and offers.</p> <p>Personalize your brand – if you're a former software programmer, reach out to potential clients in high tech.</p>	<p># of impressions</p> <p># of contacts made</p> <p># of new clients recruited through each channel</p> <p>Cost for each new client acquisition (including value of your time)</p> <p>Retention rates</p>