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**SALES  
MANAGEMENT**  
ASSOCIATION

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# Strategic Sales Plan

Suggested Format

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## Suggested Format

- I. Financial and Market Objectives**
- II. Current Sales Capacity**
- III. Getting There From Here: Changes Needed to Execute**
  - a. Sales Coverage and Deployment**
  - b. Channel Strategy**
  - c. Sales Process**
  - d. Selling Roles**
  - e. Incentives**
- IV. Goal Allocation**
- V. Performance Metrics and Plan Milestones**
- VI. Critical Dependencies and Support Investments**
- VII. Communication Plan**

### **I. Financial and Market Objectives**

Topics to consider:

- What are financial objectives? Sales, profits, share, customer, or other critical indices of performance.
- Are assigned objectives achievable? If not, why not? It is best to draw upon a quantified understanding of existing sales capacity. (Note that the final plan isn't often the time to make this argument! But during the forecasting process, which is often treated as a preliminary planning phase, there may be an appropriate time to present sales leadership's case based on capacity estimates).



## II. Current Sales Capacity

Topics to consider:

- What are the current key drivers of sales productivity for the organization as a whole?
- What are the current key drivers of sales productivity for individual sales resources? (These might best be considered separately for unique sales roles, channels, or markets.)
- What changes must we implement to improve sales productivity?
- How will changes affect sales productivity overall, and by individual sales resource (job/market/channel)?

## III. Getting There From Here: Changes Needed to Execute

Topics to consider:

- In this section, outline key changes that close the gap between current sales capacity and expected performance. Not every topic below will be relevant, given your firm's individual circumstances and needs.
  - a. Sales Coverage and Deployment
  - b. Channel Strategy
  - c. Sales Process
  - d. Selling Roles
  - e. Incentives

## IV. Goal Allocation

Topics to consider:

- How will financial and market objectives be apportioned amount available resources?
- What specific goals are given to relevant channels, markets, and sellers?
- What is the expected distribution of quota (or performance expectation), and how does this differ from prior periods? What are the reasons for the difference (how will the new allocation result in greater productivity, or how will it redress prior allocation inequities)?



## V. Performance Metrics and Plan Milestones

Topics to consider:

- What are the most important performance measures for sales organization success?
- What specific milestones are relevant throughout the year? These may be represented by quarterly goals, or specific achievements such as reaching a market share threshold in a strategic market.

## VI. Critical Dependencies and Support Investments

Topics to consider:

- What must others do within the organization in order for the sales organization to be successful?
- What investment is needed from the firm? When?
- What are the sales organization's support needs? These might include training, technology, product, operations, marketing, or executive involvement. Outlining these requirements in detail provides an important input into planning efforts for other functions.
- What must occur in other organizations for the sales force to be successful? This might include key deliverables, decisions, or initiatives from partners, suppliers, customer organizations, or others.
- What are contingent alternatives that will be considered if critical dependencies or support investments do not materialize?

## VII. Communication Plan

Topics to consider:

- What aspects of the plan represent the most significant change management challenges?
- How will the plan be communicated, both initially and throughout the performance period?
- What training or messaging will occur in order to effectively implement the plan?

