

Sales Plan Template

Name _____

Date/Year _____

1. Goals – Where am I headed? What will I accomplish? Are they SMART? (S – Specific; M – Measurable; A – Achievable; R – Results-oriented; T – Time framed)
2. KPIs – Key Performance Areas
 - a) Lead Goals – What measurable activities will LEAD to the results I want? These include what you can control – might be...# touches, # appt requests, # cold calls, # referral request, # circle of influence meetings (people who may not buy, but have enough influence to be a strong referral source), # networking meetings
 - b) Lag Goals – What measurable results show progress? These are the things you cannot control but only influence through the LEAD actions you take. They might include... # qualified conversations (phone, email, text, cold call), # sales appointments, # closing opportunities, # new clients, # new sales, sales \$ (per week, month, year), \$ income, average \$ sale.
3. The Reason Why – Why does the ultimate result matter? (Income for some reward, recognition, competitive success, fulfillment, influence, fulfillment, etc.)
4. My Sales Process

Steps	Tool(s)	Objective
1)		
2)		
3)		
4)		
5)		
6)		
7)		
8)		
5. My Ideal Client Profile – These are descriptors of your best current clients, industry, location, buyer, etc. What is the average annual revenue you want from each new client? What do those clients look like?
6. My Lead Generation Strategies – How do you uncover leads/prospects (potential buyers of your product or service that are ideal as defined in step 5, and show interest in what you are offering? (networking events, speaking, direct call/email/letter/stop by, solicited referral, unsolicited referral, web, other media, center of influence, etc)

7. Time Management Strategies – How will you manage your time?
 - a. What are your **green light** activities? These are actions that **DIRECTLY** move you closer to your goal? (Any sales meetings, networking, calls outs, emails, presentations, closes)
 - b. What are your **yellow light** activities? These are actions that are necessary, and improve your green light activities, but don't **DIRECTLY** move you closer to your goal (they may be just as important, though). They may include, preparing quotes, preparing your sales calls, sales planning (who to call/why?), client/industry research, reading, listening, coaching, sales meetings, etc.
 - c. What are your **red light** activities? These are things that **PUSH** you away from your goal. They should be either eliminated or delegated.
 - d. Incorporate Strategic Time Blocking – Block out times/appointments with yourself to do the major green light actions that lead to sales success. For example:
 - i. Important sales activities (actions that lead to results – phone, letters, email, stop-in)
 - ii. Sales preparation time (proposals, research)
 - iii. Posting (updating tracking tools, CRM)
 - iv. Planning time (to be sure your schedule includes what is needed to succeed)
 - e. Default Strategic Time Blocks into a recurring/default calendar; add other things that are important to you, but may not necessarily be green light (a good example for me is exercise and reading)
8. Professional/Personal Development Strategy – what will you do to grow yourself/sharpen your axe/maintain the right perspective and mindset/ consistently think like a winner?

Book recommendations:

 - a. *60 Second Time Out* – Mike Greene
 - b. *Eat That Frog* – Brian Tracy
 - c. *High Trust Selling* – Todd Duncan
9. Tracking & Measurement
 - a. How will you track your KPIs?
 - b. How will you track and manage your prospect/customer activity? (CRM, Excel, notepad)