

SALES PLAN SAMPLE

1. Set business goals and activities

- a. Example: Sales of \$400,000 in (year)
- b. Reward – what is the fuel/inspiration for accomplishing this goal?
- c. Activities needed: # leads, # appts, # proposals, # closing opportunities, # new clients, avg order size

2. Clarify your sales process

- a. Example:
 - i. Introduction – lead identified through lead generation strategy *
 - ii. Contact for appointment – methods: phone, email, stop by, 3rd party introduction; tools: scripts, templates
 - iii. N/A (needs analysis) appointment: methods: face to face, phone; tools: scripts, marketing materials; objective: rapport, connect, trust and caring, proposal/quote/next meeting
 - iv. PHN – write a personally handwritten note
 - v. Add to CRM/ACT
 - vi. Closing/Presentations and Proposals – methods: email, face to face (preferred); tools: proposal/quote templates & folder/materials, testimonials, contracts, credit application
 - vii. Follow through – process order, plan actions into CRM
 - viii. After sales follow through
 1. WOW – do something special – make an impression
 2. Referral request – use strategy or just ask

3. ICP – Clarify Ideal Client Profile

- a. Look at current book of business for most profitable clients
- b. Geography
- c. Relationship
- d. Size
- e. Vertical markets

4. Lead Generation Strategies *

- a. Networking
 - i. What kinds? – chambers, small groups (PRE, BNI), associations
 - ii. How much? – hours per month
 - iii. Goals - # leads to make it worthwhile
 - iv. Plan it a month or more in advance
- b. Workshops/presentations
- c. Affiliations
 - i. Who markets to the same type of audience?
 - ii. Partnering opportunities
 - iii. Routine meetings/presentations/audience serving opportunities
 - iv. Marketing together
- d. COI
 - i. Key influencers you know well that can lead you to your audience
 - ii. Identify 6 and schedule a meeting with each 2x/year
- e. Target Marketing

- i. Sales lead generation activity
 - ii. Niche marketing
 - iii. Vertical marketing
 - iv. Cold calls
 - f. Referral strategies
 - i. Formal
 - ii. Informal
 - iii. Client and COI
 - g. Social media
 - h. Web site
- 5. **Time/Priority Management Strategies**
 - a. Identify Important Activity Inventory – things you should do routinely
 - b. Fixed Items – Important things that can be fixed into a Circular Schedule
 - c. Floating Items – Important things that need to be proactively scheduled each week, month
 - d. Planning time and checklist – protected time to control your calendar by ensuring all important items are PLANNED – either by virtue of being already “fixed” into your Circular Calendar or scheduled accordingly for the upcoming week/month during this time
- 6. **Tracking and Measurement** – all KPM’s (Key Performance Measures)
 - a. Goal tracking – daily, weekly, monthly, yearly
 - b. Activity tracking – daily, weekly, monthly, yearly
 - c. Tools: spreadsheet, Google Docs, paper